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ABSTRACT

This publication reviews cross-disciplinary literature on education with the aim of informing the reader of the relation between educational governance and social inclusion/exclusion in policy and research. Various conceptual issues raised in the literature are examined first. Then, two problematics are considered to emphasize how the methods, concepts, and "theories" of social science can produce new ways of thinking, organizing action, and producing results. The section on the equity problematic explores questions of representation and access of individuals and groups to educational and social practices. The section on the problematic of knowledge focuses on the systems of reason whereby identities assigned to actors are "fabricated" in order to organize and divide. It is the authors' hopes to make visible the relation between epistemological assumptions and "real world" practices of research, policy, and schooling. Appendices contain a search of the Educational Resource Information Center (ERIC) database for the Education Governance and Social Integration and Exclusion in Europe project, lists from the ERIC alphabetical descriptor display, and short descriptions of findings by ERIC. (Contains 186 references.) (RT)

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Johanna Strandberg

REVIEW OF RESEARCH ON EDUCATION GOVERNANCE AND SOCIAL INTEGRATION AND EXCLUSION

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ABSTRACT

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This review examines a cross disciplinary literature that informs our understanding of the relation of educational governance and social inclusion/exclusion in policy and research. It differs from previous policy analyses through interrogating the relation of assumptions about governance and social inclusion/exclusion in educational policy research rather than taking those assumptions for-granted. We first examine certain conceptual issues raised in the literature. Then we examine two problematics to emphasize how the methods, concepts and 'theories' of social science produce ways of thinking and ordering action and of conceiving of results.

(1) The **equity problematic** examines questions of representation and access of individuals and groups to educational and social practices. Governance, within this perspective, is a concept to think about and judge the means by which activities are controlled or directed to deliver an acceptable range of outcomes according to some established social standard. Inclusion relates to the degree to which social groups participate in relation to the social standard, with governance as those practices eliminate (at least theoretically) the exclusion of targeted groups, such as those defined by class, gender, race or ethnicity.

(2) The **problematic of knowledge** focuses on the systems of reason through which identities assigned to actors are 'fabricated' to order and divide. Exclusion and inclusion are considered continually against the background of something simultaneously included. The problem of governance is embodied in the principles of reason (the distinctions, differentiation's and divisions). Knowledge systems govern in the sense of they provide principles for action and participation. It is here that the problem of inclusion/exclusion lies. The construction of reason and reasonable people embodied rules of action that are not equally distributed and thus function to qualify and disqualify individuals for participation.

In exploring the two problematics, we recognize that such an approach may ignore differences in which the boundaries among

problematics are pushed and their possible points of overlap. But recognizing this risk, our purpose is to make visible the relation of epistemological assumptions to the practices of research, policy, and the 'lived' world of schooling. Further we believe that an adequate research approach requires a joining of the equity and knowledge problematics that is not merely additive but a rethinking of the conceptual ways that we organize research.

Keywords: Education governance, Education restructuring, Governmentality, Inequality, Inequity, Knowledge/power, Research review, Social inclusion/exclusion, Social integration

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I. INTRODUCTION

In this report, we focus on relations between education governance and similar concepts on the one side and social integration and exclusion on the other. The review is carried out as a workpackage in the cross-national research project "Education Governance and Social Integration and Exclusion in Europe" (EGSIE), which is financed by the EU/TSER. For a presentation of the research project, see Lindblad & Popkewitz (1999).

As part of the EGSIE project, we decided to present as early as possible a critical literature review concerning different theoretical perspectives and conceived results from research dealing with education governance and social integration and exclusion. We wanted it to be based on national as well as on international discourses in different disciplines. The intended focus is on texts that deal with (changes in) education governance in relation to social integration and exclusion. What do these texts say about this relation? How does this relation work? What are the theoretical and empirical evidences for different arguments and positions?

Even while in the process of writing the proposal to the EU/TSER, we realized that this would a difficult task, considering the variety of discourses, research approaches, and disciplines dealing with this vast and amorphous field. Our method for carrying out the task was as follows:

- To ask each participant in EGSIE to review national discourses on education governance and social integration and exclusion,
- To explore existing databases – in practice, the Science Citation Index and the Arts and Humanities Citation Index as well as ERIC – in order to gather information on research from a variety of approaches,
- To analyze concepts and their relations on the basis of our outline of research as presented in the proposal as well as in different texts from EGSIE partners.

The first task was carried out by our partners. Here we found national as well as international texts of importance for EGSIE. The second task was carried out by Johanna Strandberg. In Appendix 1, the approach and result of her work is presented with a focus on the ERIC

search. It should also be mentioned that the Social Citation Index search resulted in several findings of interest as well.

This review focus on research approaches and theoretical concepts and categories. Thus, it will not have the empirical stance–focusing on methods and results–that is rather common in reviews of research within the social sciences. To try to make shortcuts here, presenting research results as such, would lead to several mistakes later on, which we are sure the reader will understand when entering the following discussion.

Our review has–as our title indicates–two foci. The first focus in on education governance and related concepts and the other is on social integration and exclusion of youth. As for the first focus, there are a good many texts dealing with this issue. A good example here is Gösta Esping-Andersen's (1996) work on recent policy changes in Europe and other countries that he calls 'welfare states in transition'. Esping-Andersen presents different routes used by welfare states to deal with internal as well as external factors that threaten their welfare, such as how to deal with increasing global competition leading to demands to devaluate the labor force, e.g., in Scandinavia. His emphasis is on education reforms that lead to higher job qualifications and thus provide the greatest benefit to society in the long run. Within the field of education research, a number of studies have dealt with the restructuring of education in terms of deregulation, decentralization, marketization and so forth. Papagiannis et al. (1992) relates such tendencies to economical and organizational changes in the private sector in general and Fowler (1995) discusses general trends in how educational steering has changed in Western countries.

The other focus deals with social integration and exclusion, especially in regard to youth. Here we find studies dealing with e.g., exclusion in different ways. One example is David Seidman's historical analytical work where he discusses the merit value of education in relation to the number of positions on the labor market and the percentage of students that take a certain exam, e.g., from upper secondary education. Seidman argues that an inclusive education, where almost all students are expected to get this merit, will turn out to have an excluding function, since a lack of this merit will have a negative stigmatizing effect and at the same time will have little merit value. The second focus also entails studies of

gender, class and ethnicity as well as the consequences of being disabled. Concerning Swedish studies of the upper secondary school, Jan-Olof Hellsten and Héctor Perez Prieto (1998) have presented a recent review of research on exclusion and marginalization in which they present different ways of understanding inclusion/exclusion in research, based for example on conceptions of students' own deficiencies or on deficiencies in the educational system. This and other studies point to the need to remember which categories are being used in research.

Later in this report, we will show that the connections between these two fields of research are relatively few in number. We will also show that there are several conceptual problems in trying to relate these fields to another. First, though, we will present the results of our review.

II. DISCUSSION OF GOVERNANCE/EXCLUSION AND INCLUSION

For the purposes of this review of literature, the central problems of the EGSIE project on education governance and social integration and exclusion will be examined from the focus-point of the link between the concepts of governance and inclusion/exclusion. We have chosen to replace the concept of social integration with that of inclusion/exclusion for theoretical reasons, discussed later in this text. Furthermore, rather than seeking comprehensive coverage, this review seeks exemplars for considering the directions taken among the various literatures that have a bearing on this problem. We proceed in this manner because of the difficulties of presenting a review when there is an abundance of literature and numerous theoretical and categorical ways of classifying the central problem of the EGSIE research project. Finally, this review explores conceptual linkages between the two sets of categories of governance and inclusion/exclusion, where existing research typically provides no conceptualization, except tacitly through how the problem is defined. For example, a study may examine standards for admission of girls to secondary or tertiary education in exploring equity. The inference of the study is that policy related to entrance standards is considered a governing practice in relation to gender equity. Furthermore, this assumption relates to conceptions of the state and issues of power that may go unelaborated and untheorized in the original study. Our purpose in this review, then, is to consider certain conceptual dimensions of the problems of the EGSIE research by reviewing and interpreting different sources of literature that we believe have a bearing on its conceptualization and data collection.

Therefore, to make the problem of a literature review manageable and productive to the comparative research, this discussion is constructed in the following way: The review moves between two analytical levels, raising general theoretical issues that emerge in discussing the existing literature and at the same time exploring exemplars in the studies of governance and inclusion/exclusion through drawing on international literature as well as studies related to the participating countries. The literature search examined cross-disciplinary fields in order to outline certain elements of the problems

of collaborative comparative work. For the purposes of this review, the discussion subsumes the category of social integration within the problem area of inclusion/exclusion. While the literature generally treats the concepts as analytically separate, our task has been to think theoretically about the relations between the two sets of concepts (Popkewitz, 1998a, b). The review will move among multiple disciplines of education, historical anthropology, political science, and sociology as they have relevance to thinking about the conceptual problems of the study. We have restricted our discussion of education to primary and secondary schools for reasons of manageability. Finally, where appropriate, we have integrated the general literature with the particular studies of the participating countries of this research project.

The discussion is divided into two parts. First, a review is made of the literature that explores the conceptual difficulties of relating governance and inclusion/exclusion. Second, theoretical positions on the relation of governance and inclusion/exclusion are explored.

III. DIFFICULTIES AND POSSIBILITIES IN TYING DOWN THE CONCEPTS OF THE PROJECT

At first glance, the problem of governance and inclusion and exclusion appears to involve extensive literature. The number of articles that have reference to the concepts of this study proved itself to be more than 17,000. When the literature was analyzed, certain difficulties emerged in assumption classifying it and discussing implications and consequences. While our starting point is that there is a theoretical relation between governance practices and inclusion/exclusion, the general literature of social sciences and policies assumes that relation rather than conceptually exploring it. Governance principles, for example, are assumed in discussions of inclusion, such as the relation between full employment and social welfare policies. Even when the concept of the state is deployed, it is usually used to talk about the relation of explicit governmental policies and outcomes, situations which we will argue later have no single or causal relation. At the other end of the spectrum of research are studies that are descriptive of particular policy practices without any strong theoretical interpretation by which to generalize about outcomes and governance practices.

This section, then, explores and identifies some of these difficulties in conceptualizing and generalizing about the relation between practices of governance and practices of inclusion/ exclusion. These include: (a) the use of the same term to mean different things in different studies; (b) the ways in which existing categories can obscure political and social issues; (c) the problematic relation between inclusion and exclusion; (d) the contested qualities of the research categories; (e) the problem of reductionism and complexities of social phenomena. We conclude this section by arguing in favor of a particular conceptualization of the relation of governance and inclusion/exclusion.

A. The Use of Multiple Descriptors and Multiple Meanings

The limitations of the existing literature become apparent with a citation search (see Appendix 1). If one starts with a citation search to identify existing literature, the field is contested. In a citation search using the keywords of *policy, theories of the state, policy networks, management, governance,* and *implementation*, there were possible 47 combinations of references located in the period from 1978 to 1993.

A second search of the ERIC data base for descriptors related to governance and social inclusion/social integration indicated an immense number of entries. The descriptor of *social exclusion* for example, yielded four significant entries, but the category of *social integration* yielded 2385 entries; *educational policy and educational discrimination* produced 101 articles. When the entries were placed into a matrix that crossed *governance/educational policy* with *social integration/exclusion* across level of education and level of governance (local, national, global), the matrix produced 100 possible combinations in which to search for relevant literature (see Appendix 1).

One way to understand this proliferation of research is to look at its descriptive qualities. The existing literature tends to focus on specific governmental policies without providing much conceptual development that is necessary for comparative research. The existing research on governance, for example, points to particular policies of a government and then describes some aspect of its history or practice. The problem is that the research fails to make connections to broader frameworks that would enable comparative studies. At the other end of the spectrum is the deployment of concepts that are not historically embedded. In Germany and Spain, for example, recent educational research focuses on the concept of *autonomy* as it relates to decentralization projects of policy. Such research, however, tends to treat autonomy as an absolute, non-historical category, assuming, for example, that decentralization produces autonomy at the institutional and individual levels. This lack of theoretical development of the concept of *autonomy* makes it not a useful category for comparisons.

B. The Ways in which Existing Categories Can Obscure Political and Social Issues

It is easy to adopt a normative theory in thinking about governance and inclusion/exclusion. The terms are catch phrases that relate to current cultural and political anxieties. In the last parts of the twentieth century, the ethical-political project of the state has been to open up spaces for inclusion through the administrative patterns of social planning. Social and educational theories often begin with a principle and then study whether existing policies and institutional practices in fact permits more social inclusion. Many studies measure how such inclusive practices function according to certain state policies, such as market approaches to introduce competition in school attendance as a strategy to improve the quality of education.

One can look at discussions of neoliberal policies in social and educational arenas during the late 1980s and into the 1990s as an example. This research focuses on particular changes in government, such as the election of Margaret Thatcher in Britain and Ronald Reagan in the United States, in arguing that there has been a general rollback in the welfare state model (see, e.g., Molnar, 1996; Chubb & Moe, 1990). The research, often with different ideological agendas, focuses on changes in the ways the welfare structures of societies are re-organized, using phrases like marketization and privatization to either laud the new millennium or to chastise the state for failing in its moral obligation.

This type of research is evident in Swedish research during the period in the 1990s when there was a Conservative government that emphasized a more individualistic approach to participation than the previous Social Democratic government (Englund, 1994). The research on the changes in educational policies focused, for example, on how the collectivist purposes of society were being undermined through a new emphasis on an individualistic ethos.

The difficulty of such research is that it exemplifies what Bourdieu has called spontaneous sociology (Bourdieu, Chamboredon, & Passeron, 1991). Such immediate responses to the political contexts are made without adequate sociological and historical reflection of the sets of relations embedded in the changes. Nor is it possible to reflect on the relation of cognitive structures of science and social

structures (Bourdieu & Wacquant, 1992). Such interpretations provide cultural capital to the researchers who promote such quick analysis, but provide little useful knowledge about the sets of relations embedded in the occurring changes.

A different but a related problem is that social and political issues may be obscured through the classifying practices of inclusion/exclusion. The use of social inclusion, for example, as a category for policy and research may subsume and thus obscure a more focused discussion of social issues that previously were given attention through concepts such as participation, citizenship, and racism. Goodwin (1996) argues, for example, that the emphasis on social inclusion mis-diagnoses the problem and mis-prescribes the cure from most of the social ills to which it refers (p. 344). Inclusion/exclusion, Goodwin continues, refers to deeply held values and strongly rooted moral institutions, but its practices may reinforce marginality. Talking about including the excluded may mean just moving the boundaries or the lines of the margin, thus in fact readjusting the boundaries and re-instituting marginality but with new lines of differences (Goodwin, 1996). This is one way of thinking about the functions of education as a credential system. As educational rates of completion change, so does structural function of credentials in relation to social mobility in industrialized countries (Collins, 1979; Brown & Lauder, 1996; Meyer et al., 1998).

But the joining of efforts of social inclusion/exclusion and governance is not only an ethical-political problem but also a theoretical one. The latter intellectual task, we believe, is not to be seduced by the rhetoric of policy and expressions of social commitment but to interrogate social practices and the systems of classification that organize practice. It is to think about the things that seem self-evident and to render the entrenched cultural judgments for judgment (Kant's notion of critical by judging the judgments) by exposing their contingent character and practical effects. Our approach in this review is interpretive and analytical when examining the existing literature.

C. The Problematic Relation Between Inclusion and Exclusion: Is Inclusion Better than Exclusion? Sometimes, No!

It is easy to assume that the relation of governance to inclusion is unproblematic, i.e., a good society is one that eliminates all sets of exclusions. But such a normative view eludes certain historical complexities.

At the governmental level, Dryzek (1996) argues, for example, that research on governing policies need to distinguish between political inclusion and symbolic inclusion of different groups and categories. This distinction enables one to consider that formal political equality can mask continued exclusion or oppression. Making a distinction between the practices of the state and civil society, for example, or promoting democratic processes, might mean that the formal governance practices of the state should exclude social movements in order not to obstruct them with the burdens of state bureaucracy and regulation. Environmental and feminist movements, for example, function differently and with more diverse and flexible patterns of influencing policies and promoting group goals when they are separate from state institutions.

At the same time, we cannot assume that the categories of inclusion and exclusion are by definition oppositional. If we make the distinction between cultural and social inclusion, for instance, there are numerous examples of groups who do not want to be culturally included. Thus, when social and cultural inclusion/exclusion are placed together, the result may be conflict. Issues of national language teaching and the dress of Moslem girls in French schools are examples of possible conflicting interests where social policy and cultural interest collide in a discussion of inclusion/exclusion. In this context, exclusion should not be confused with social differentiation per se, since the existence of boundaries may not mean exclusion. Certain religious and social groups may not want to participate in schooling or follow the normalized routes of social movement associated with formal schooling.

Furthermore, the effects of inclusionary politics can serve multiple purposes which cannot be assumed prior to examining the political and social practices. In recognizing differences, indigenous peoples

in, for example, Canada and the United States are enfranchised under one person/one vote, but such a principle can deny representation. In New Zealand, Maori are given an allocation of seats in the parliament through group representation rather than through one person/one vote rule. There are other instances, too, when the principle of universal citizenship can be repressive, since it does not recognize experiences and interests different from those not already dominant, such as the exclusion of women, ethnic and racial groups, old people, poor people, disabled people, gay and lesbian, etc. (Dryzek, 1996; Pateman, 1988). There are also examples of political inclusion where exclusion occurs to neutralize oppositional groups rather than to address issues of inclusion. The history of the ruling party in Mexico is an example of this, having routinely sought to incorporate oppositional groups into the government so as to neutralize their agendas (Dryzek, 1996).

These examples direct attention to governance, inclusion and exclusion as concepts that embody sets of distinctions and differentiations that cannot be assumed but need to be questioned. When there is talk about developing a more inclusive community, for example, whether that inclusive community is within a nation or intra-national as in the European Union, there is a need to recognize that the conception of the community may be framed by particular sets of norms and values that function to exclude some possibilities even as they include others. In Anglo-American literature, social exclusion is often placed within a theoretical and policy perspective that denotes a matter of free, rational choice, such as choosing a school through a voucher system; it advocates creating a multi-cultural curriculum so that different immigrant groups will be included in the definition of what is accepted as normal and reasonable. But this is the rub. The systems of reason inscribes norms that function to exclude since they create a continuum of values that divide those who have normative behavior from those who are different, a phenomenon that will be discussed later, in the section of governance and inclusion/exclusion as problems of knowledge.

D. Contested Categories

When the particular concepts of research are examined across the literature, we see that the terms are contested. The same concept can

be defined in relation to more than one term [it is an *onomasiological* term]. If we use *governance* as an example, Rhodes (1996) found at least six separate uses of *governance* in the literature. *Governance* was used as: (1) arguments for the minimal state as evident in neoliberal ideologies and its critiques; (2) corporate governance; (3) discussions about the new public management; (4) good governance; (5) socio-cybernetic systems; and, finally, as (6) self-organizing networks (p. 653).

When we examine the categories of *inclusion/exclusion*, similar issues are raised. As with *governance*, there is no single set of definitions or concepts. An examination of its variations reveals it to be a contested concept that inevitably involves endless disputes. The term *exclusion*, according to Hilary Silver (1994-95), is expressed not only in relation to national and ideological contexts, but also in relation to discussions about the new poverty and inequality (e.g., single parent families), discrimination, marginality, foreignness, alterity, closure, disaffiliation, dispossession, deprivation, and destitution. [539]. Silver presents a typology of meanings of exclusion in terms of three "paradigms" related to French republicanism, liberalism and socialism, where the sources of social integration are related to morality, exchange and citizenship. As can be seen, the importance of contextual clarification of the meaning of exclusion is evident.

E. The Problem of Reductionism and (Non)Causality.

Attempts to produce topologies of complex phenomena have tended to be reductionist. Furthermore, such reductionism tends to impose explanations of causality which in many instances are of coexistence or correlation (Silver, 1994-95). There are paradoxes of governance policies that enable exploration of relations but not explanations of causal factors. Globally, for example, contemporary societies are marked by the coexistence of two phenomena: the emergence of different types of what is known as social exclusion on the one hand and a continuous increase of school qualifications on the other hand. Brown et al. (1997) make this argument. They discuss the school as a site of struggle between the dual and sometimes contradictory functions of socialization and selection. The former involves

searching for symbolic codes that can develop a collective sense of a nation and of self within that community. At the same time, the school has the credentialing function of educational attainment. These dual functions of the school can and do collide in exploring problems of inclusion and exclusion.

The coexistence of the two goals prevents the establishment of relations between cause and effect in a linear and simplistic way in which school exclusion would automatically lead to social exclusion, for example, where a long and successful scholarship would in turn function as an antidote against social exclusion. Attempts to define factors that produce exclusion are numerous, fluctuate, and interact in such a way that often they end up reinforcing one another (Fragonard, 1993 quoted in Silver, 1994-95).

An understanding of the complex relationship between the social inclusion/exclusion phenomena and educational policies phenomena demands a re-equation in a wider societal framework in order to understand the paradox of the coexistence of economic development and the systematic increase of poverty, inequality, and unemployment.

F. Relatedness of Inclusion/Exclusion and Governance: Looking for a Pragmatic and Historical Theory

The citation review suggests that there is little if any literature that conceptually or empirically works the categories of this research into an interpretative framework. That is, governance and inclusion/exclusion are treated as analytically separate rather than as related phenomena. For example, studies of educational policies examine the effects of governance policies on variables of educational outcomes, such as achievement or drop-out. The policy is typically subjected to an investigation of outcomes, and theoretical questions of the relation of governance and inclusion/exclusion are subsumed in order to prove or to disprove an outcome of specific governmental policies, such as that of school choice or increased participation in school decision-making through decentralization policies.

For purposes of this review, we draw on linguistic philosophy and the traditions of the sociology of knowledge in our thinking about the categories of this review. Methodologically, the concepts of inclusion

and exclusion are viewed as mutually related and therefore as a single concept.

At one level, there can be no outside without an inside. Inclusion is a practice that makes sense only against the background of something simultaneously excluded (Goodwin, 1996). Put simply, whenever one moves to create a more inclusionary system, that system functions as a map in that it organizes the territories of membership by producing boundaries between the members and nonmembers. Nonmembership is created every time membership is defined. Inclusion and exclusion become, from this perspective, mutually related concepts rather than distinct and separable.

But this notion of inclusion/exclusion becomes more complex when tied to systems of governance. At one level, we have studies of inclusion/exclusion that focus on the groups that are represented or marginalized through and in educational practices. These studies, whose focus we will later call *the equity problematic*, investigate how social policy promotes or limits access and opportunities. Governance practices are conceptualized as related to organizational, technical, and ideational practices, such as typified in labeling and socialization theories. But if we think of governance as related to the legal-administrative functions of the state, we can see that its practices to steer students toward work through vocational education have not historically been only about inclusion. However, as Blackmore (1992) has illustrated, these practices embody gendered qualities that are selective and exclude (e.g. from graduate school) as they include (e.g. in the work force). The problem of governance in the equity problematic is one that incorporates notions of repression and domination typically found in liberal theories of stratification and Marxist conceptions of class. It reduces the meaning of *power* to its repressive mode.

A different level of studies of inclusion/exclusion scrutinizes how the systems of reason in social and education practices qualify and disqualify action and participation through the principles generated to order and classify the world and an individual's capabilities. It is argued within this problematic that the discourses that form policy and social science, for instance, embody normalizations and distinctions that classify individuals according to their dispositions, capabilities, and sensibilities. Governance practices within this problematic are found in the systems of distinctions, differentiations

and divisions which organize individuality. Governance is a practice concerned with how action and participation are produced. This is a different set of theoretical assumptions than the ones which posit power as repressive of an individual's access or participation. The problem of focusing on knowledge is typically found in research that understands knowledge through Kant and Nietzsche rather than through Kant and Hegel (Owen, 1996). Such perspectives are embodied in post-modern and post-structural analyses found in feminism, historical genealogies, and post-Kantian social and political theories (see, e.g., Connelly, 1987; Shapiro, 1992; Popkewitz & Brennan, 1998; Simola, 1993; Simola, Heikkinen, & Silvonen, 1998).

In the next section, these different problematics will be explored. But before moving into that part of the review, we need to foreshadow our discussion by making this comparative study historical and pragmatic.

We can think of historicizing the problem of governance and inclusion/exclusion as seeking to generalize while maintaining a specificity to national configurations. Let us consider two related examples.

The importance of historicizing the discourses of comparative policy is illustrated in a comparative study of the representation of and practices related to immigrants in France and the United States. An instructive study in this context is Noiriel's (1998/1996) comparative study of French and U.S. ways of dealing with the relation of immigration, citizenship, and nationality. Noiriel argues that there are no heritages of nationality, only national imagineries constructed through communication structures that interrelate with particular material structures of territory and state as processes of governing. From this perspective, he examines the differences between France and the U.S. in order to understand how systems of inclusion and exclusion developed through state processes of governance. Noiriel argues, for example, that while the total number of foreign born citizens in the U.S. and France are comparable, there are historically different ways in which the immigrant has been represented and made part of political discourses. In France, immigrants are absent from collective memory. This has to do in part with the way in which the immigrant, ethnicity, and race were not considered legitimate components of public life. For example, French

centralization efforts in the formation of its modern state as well as the French Revolution discredited the idea of origin, which included the identification of one's previous country of birth. Further, a Cartesian binary logic held in official categorization. This did not permit mixed categories; one was either French or foreign born. Finally, the census-taking apparatus disregarded the use of language, religion, or race as criteria of classification. There are no races, only French people! The French construction of the national citizen focuses on socio-professional categories and juridical criteria of nationality. This led to a cultural celebration of ethnic cultures but did not allow a politicization of ethnicity as an object of public controversy. In contrast, the nineteenth century U.S. classification system defined racial categories in extreme detail, and the notion of the hyphenated-American is well-known.

This historicizing of the social issues of governance practices and social inclusion involves another dimension in its duality. While the notions of governance and inclusion/exclusion are politically and ethically important, it is also important to recognize that the very problem of organizing a project around the idea of social inclusion marks a particular historical discourse, which in addition has a dual regulatory quality. The mobilization of such a research discourse produces a system of recognition that can transcend national boundaries in classifying and thus dividing the identities (e.g., gender discourses of the 1990s) while, at the same time, those discourses have particular social locations in constructing identities. This construction of identities occurs in the way in which individuals and groups are placed inside or outside the discourses of analysis and interpretation.

But the historicizing of social phenomena cannot be taken for granted. The particular mobilization of a research discourse through funded research is part of a social field in which a certain selectivity is produced. Even the discourse of this research project, even if it goes against the grain, is nonetheless sanctioned through and circulating within the entity of a European Union funded project. This sanctioning emerges in a way that is different from previous mobilizations of discourses that relate the social sciences to state welfare efforts. The new entity is not a nation-state or an international organization such as the United Nations or the World Bank. It is a new supra-state entity of the European Union. To recognize this is to

recognize that such discourses recreate boundaries of identity as new cultural imagineries producing obligations, responsibilities, and boundaries of identity for a citizenry, which is an issue that we will take up later in the discussion of the existing literatures. The duality of such discourses about social inclusion and governance, therefore, is that it responds to important social and cultural issues embodied within the boundaries of the European Union while producing the imaginery and narratives that constitute the Union at the same time.

Yet, to say that the terms are contested and connote political and well as intellectual quagmire is not to ignore the political and scientific importance of the concepts. The nature of the terms that are defined may have important political implications since it can (a) highlight the generalized nature of the problems and thus useful in building broad-based coalitions to reform European welfare state, *or*, (b) the exclusion discourse may ghettoize risk categories under a new label and publicize the more spectacular forms of cumulative disadvantage, distracting attention from the general rise in inequality, unemployment, and family dissolution that is affecting all social classes (Silver, 1994-95, p. 540).

This leads us to consider theory about governance and inclusion/exclusion as pragmatic and historical. Drawing on Bourdieu (1980/1990), social theory has typically been defined through thinking of practice as a problem of applying the logic of theory to the vagaries of the social world. He argues, and we agree, that in contrast, we may need to think of the logic of practice as being different from the logic of theory. The contingencies of social life are always more complex and nuanced than the pure logic of theory. There is a need in social theory, therefore, for pragmatic approaches which allow for contingencies and thus historical variations. Ellison (1997), for example, argues that traditional accounts of citizenship in state-centered, pluralist, and certain post-structuralist theories (of which the concepts of governance and inclusion/exclusion clearly overlap) have not been able to account for the variegated social forms in which actors negotiate social change and create new identities and solidarities across a range of possible settings. While not necessarily accepting Ellison's position on actor networks, our study does accept the need to search for comparative strategies that are both historical and pragmatic in orientation.

Thus, it is with these limitations and directions from existing discussions of contingencies and historical questions that we begin this review.

IV. TWO ORIENTATIONS TO THE PROBLEM OF THE EGSIE PROJECT

If we analyze our reading of the literature, two types of relations between governance and inclusion/exclusion are found in exploring the assumptions and implications of current educational restructuring. These are *GOVERNANCE AND INCLUSION / EXCLUSION* as:

(A) PROBLEMS OF EQUITY
(B) PROBLEMS OF KNOWLEDGE

In making this distinction, our purpose is both conceptual and specific: to outline the implications and assumptions of different conceptual distinctions as they are inscribed in exemplary studies. As stated earlier, this discussion is not meant to be an exhaustive review of the various literature related to the problem but as a conceptual mapping that orders and illustrates literature related to this research project.

Problems of Equity

One concern with equity is the dominant mode of exploring the problem of inclusion, exclusion, and governance in contemporary literature. The terms of inclusion and exclusion are treated as analytically and empirically distinct. One approaches social inclusion, for example, as a practice that is to eliminate exclusion. At least in theory, inclusion is the normative standard that is privileged even when examining processes of exclusion. The problem of governance is explicitly or implicitly thought of as administrative or social practices that promote integration of groups and individuals in social, cultural, and economic relations. Studies of inclusion look, for example, to identify forces and practices that permit or limit access to social practices and values, with the intent of proposing policy and research to facilitate for all people to participate as part of the polity and thus to develop a more inclusionary society and economic structure. The idea of inclusion as a goal of social policy underlies different policies of the post-World War II welfare states, including comprehensive school reforms.

We view this definition of the problem as ***an equity problematic***, asking which groups do or do not participate in social practices in an equitable way and the mechanism of policy that governs inclusion or exclusion. The principle is that participation/non-participation is one of categorical inclusion of specific population groups in society, such as women, social class, and defined ethnic and racial groups. In certain liberal research approaches, equity is focused on as a technical question of adjusting policy and practices, such as school choice and privatization, rather than in structural social and political factors. Left and neo-Marxist research maintains an image of equity, although with a different ideological agenda than in liberal research. Their concern is to how broader social, political and economic structures limit participation.

The equity perspective, with its different ideological positions, has dominated social policy and research throughout Europe, North America, and Australia. Most official statistics concerned with social exclusion and transition points within educational systems are based on an equity perspective (see, e.g., Halsey et al., 1997). Most discussions of multi-culturalism inscribe this assumption but with a concern to cultural representations.

(1) Inclusion and Exclusion as Representation and Access

Exclusion within this equity notion of inclusion is a separate concept, a by-product of incorrect practice of inclusion, of power relations embedded in structural forces and corrected by, for example, better policies that give representation (or voice) to the varied social interests and more equitable welfare policies that help to reduce economic disparities. Most social and educational research within this perspective of inclusion focuses on groups or individuals who are represented or omitted from participation and the sorting devices that produce stratification or segregation. Most of the equity research relates governance practices with research through comparisons of differences among groups to determine which groups are excluded. Where the concept of the state is deployed in examining social practices, it relates to the institutional practices and agents of government that function to govern the acts of governing. Such governing problems relate to social criteria, such as integration into labor markets, representation in political processes of participation,

and the effects of market policies and decentralization practices on school access and achievement.

The notion of exclusion assumes that governance strategies can be identified to produce equal access to social, cultural, and economic resources. The equity perspective tends to underlie, in one form or another, the classifications of educational transitional points, international comparative data of achievement, the idea of welfare state models in comparing educational achievement, and the zero line of education.

Class stands as the singularly most important category of research about inclusion and exclusion. Greek studies of equity, for example, have traditionally focused on who moved through the compulsory educational system as related to class. More recently, gender, ethnicity, and race have been added to the country's studies, although there are important debates about structural issues of base and superstructure, that is, what categories are privileged or which are to be understood as relational. In some instances, exclusion as it affected religious and ethno-cultural minorities has been studied (Persianis, 1978; Kazamias, 1978; Kazamias & Psacharopoulos, 1985; Eliou, 1978). In the past and present studies related to an equity perspective, exclusion, then, stands as a social practice produced through lack of access or barriers for the inclusion of certain groups or individuals.

A distinction in governance can be made between government of education through a *governing rule* and governance as a *goal-directed or steering practice*. Lawn and Ozga (1998), for example, argue that, up until the 1970s, the government of education in Britain was based on the procedures for elected participation with a focus on representatives who serve on local councils. This political participation in the government of education has remained low with a sharper delineation of political/professional power and central/local control since the 1970s. Since that time, government has been transformed into governance or steering through centralizing financial control and standards of outcome indicators that are coupled with local competition and changes in the constituencies through which local decision-making is to occur.

For descriptive and illustrative purposes, we can further differentiate existing research about equity in representation and access as related to: social characteristics of economic labor markets;

cultural issues of representation such as those embodied in the concepts of gender and ethnicity; and various groups of the disabled.

The consideration of the social actor as a key focus of school governance policy and research in Francophone literature is linked to the concept of the construction of the work of the school. The position of the actor then becomes a key point in the school inequality issue (Charlot, Beautier, & Rochex, 1992; Perrenoud, 1994; Rochex, 1995; Develay, 1996).

(2) Inclusion and Exclusion in Labor Markets

Current OECD studies of governance conceptualize the problem of inclusion and exclusion (Isance, 1997; Evans, 1996; OECD, 1995, 1997; Pave, 1996) as the problem of schooling and how to organize it in order to promote access and success. OECD discussions of education and social exclusion focus on the relation of social and economic environment with the relation of education and income level as the definition of social inclusion/exclusion. This discussion makes note of the fact that there have been changes in the distribution of poverty through the creation of new groups (e.g., children and parents in single parent homes, and elderly women). The reports also note anomalies (in the Netherlands and Sweden) in the relationship of strong bonds between *social background* and *educational career.* Finally, the OECD discussion accepts neoliberal ideas of markets as a solution to governance: that is, to introduce economic discourses of *markets* into the parental selection of schools in the belief that it will increase choices for parents and thus provide new possibilities.

The OECD literature as well as various national literature sources assume that schools have functioned as a sorting device that serves to elude social groups in ways that are counter to national social goals. The terms of the problem are to equalize an unequal playing field through eliminating exclusionary practices and thus promoting greater inclusion. Studies have focused on, for example, how class-related cultural factors shape parents' compliance with teachers' requests for parental participation in schooling (Lareau, 1987). School choice in the greater London area, for example, was found to involve an interplay between social class and cultural capital as parents looked at the different types of schooling for their children (Ball et al., 1995). Similar patterns are present in students' ways of orienting themselves in their career choices (Ball, 1998). Research on policies

related to school choice in Great Britain and the United States, for example, begin with governmental policies and then examine the uneven effects of efforts to increase parental options and involvement in the schools through school choice policies (Whitty, 1997a, b).

One aspect of the research has focused on the relation between educational success and achievement and requirements of changing labor markets. These changes are posited in relation to changes between a neo-Fordist, bureaucratic model of production to one that is built on a post-Fordist, flexible paradigm of work organization (Brown, 1990, 1995; Brown & Lauder, 1996). Aronowitz and De Fazio (1994), as well, focus on technological changes which have transformed knowledge into a productive force and thus the center of selection processes in the economy. The changing patterns of work, it is argued, have produced different selection processes as access to the cultural capital has shifted in education. These selection processes, the argument continues, have replaced an emphasis on ascription and merit to a greater emphasis on personality, resources, and cultural capital or what Max Weber labeled as *charismatic* characteristics (Brown, 1995). These changes in the codes of recruitment into the labor force, Brown argues, also produces new patterns of exclusion.

Finnish studies have focused on the circumstances surrounding the dramatic increase of unemployment and other traditional features of marginalization in the early 1990s in a number of studies with a social policy and labor market view. Various researchers have raised warnings about new social exclusion and increasing division in society due to occurring economic and culture changes (Rahikainen 1991; Ritakallio 1994; Suikkanen, Kauppinen & Viinamäki 1996; Kangas 1998; Kangas & Ritakallio 1996; Poverty and Social Exclusion in Finland in the 1990s 1997). Also the relationship of education to new problems of massive unemployment are treated in the Finnish literature (Suikkanen et al. 1996, Rinne 1997; Salavuo 1997; Mustonen 1998; Työttömyys tutkinnon jälkeen, 1997; Rinne & Salmi 1998).

Ritakallio (1991), for example, has noted that only one third of those receiving sustenance allowance in Finland had achieved a vocational degree leading to a specific occupation. A survey by Vähätalo (1996) concerning long-term unemployed showed that problems accumulated the most for those with only a basic education. Problems of poverty and vulnerability become more rare as we move

up the educational scale. Ahola, Kivinen & Rinne (1992) found empirical evidence that one fifth of the cohort leave school without the diploma necessary in a credential society, as also calculated in OECD countries in general (Coleman and Husen, 1985). There is a good deal of empirical evidence from Finland as well that working class boys are at-risk of being classified as "socially unadaptable" during their school years (Lampela & Lahelma, 1996, Blom et al. 1996, 159-60, 255; Takala 1992). This lack of fulfilling the credential function of school and its resulting unemployment among young adults aged 17-29 will weaken faith in education as a profitable investment (Nyyssölä, 1994; Silvennoinen and Klas, 1996)

Francophone literature has tended to focus on the issues of labor and culture in a manner that has difference implications and questions about governance. The conflictual unity that opposed labor to capital in modern industrial societies has been replaced in French-language literature through discussions of the *social issue* of a dualistic fracture between the integrated and the excluded. This *metamorphosis* of the social issue (Castel, 1995; Rosanvallon, 1995; Gorz, 1997) corresponds to a change in the way immigration in European countries like France is now envisaged, not as a phenomenon of economic nature, but as an ethnic and cultural phenomenon (Wierviorka, 1996). The very structure of the school system, it is argued, produces relative exclusion in the context of the *new* social issue of ethnicity and the cross effects of an increase in qualification demands, increasing depreciation of diplomas, increasing inequality (Fades and Rosanvallon, 1996), and structural mass unemployment (Rocard, 1996).

(3) Cultural Representations and Gender

One of the more elaborate research programs in the equity field in recent years has been related to the questions of economic access and gender. The work of Elgqvist-Saltzman and her colleagues stands out here as pioneering (see, e.g., Elgqvist-Saltzman, 1992a & b; Bjeren & Elguist-Saltzman, 1994). Elgqvist-Saltzman (1992a & b) conducted empirical studies of labor markets and education in an exploration of the different trajectories of men and women in the movement in and out of the labor markets. Her work extended to the Nordic countries to understand the ways in which women's occupational roles have expanded in certain vocational areas while not progressing in others.

Käller (1990) viewed gender issues in relation to ruling techniques and school careers in relation to social origin. Wernersson (1989) focuses on preconditions and possible means toward gender equality and comments that there has been little impact of the materials of gender differences on teacher education.

A strand of studies in Australia and Britain also links class and gender. Blackmore (1997), for example, explored the relation of vocationalism and the idea of skill in Australian governmental policy toward education. She argues that the policies have consistently been part of a wider discourse of vocationalism that is gender specific in its notions of skills. Weiner, Arnot & David (1997) argue that the new discourses of gender in Britain are concerned with male disadvantage. These discourses, they argue, have powerful class and racial dimensions, with the impact of black and/or male working class under achievement interpreted as a threat to law and order, and male middle class under achievement as deriving from problems of attitude, complacency, and arrogance. Furthermore, while there have been improvements in performances of children up to the age of 16 since the 1970s, this is not the case with the post-16 year olds, and the labor market is still sex-divided, segregated, and largely disadvantageous to female workers.

A different thread of studies focuses on the systems of representations in classroom practice which limit and set boundaries on participation and action. Two studies stand out in this strand. There are gender studies that consider how pedagogical practices can both enable and disenable girls in school (see, e.g., Walkerdine, 1988 in Great Britain; Luke & Gore, 1992 in Australia and the United States). Öhrn (1993), for example, conducted empirical studies of gender patterns found in student-teacher interactions. She studied the individual teachers' and students' statements about, and definition of, a given situation to understand how the constructions of schooling are ideological demonstrations and generative in the reproduction of a society. For example, Öhrn used observations and interviews of grade nine, middle-class girls to understand how they use gender constructions and subordinate position to gain influence and overcome their powerlessness.

Another type of study concerning pedagogical representations seeks to consider the relationship between school knowledge and social location to define vocational and career trajectories of students.

Frykholm & Nitzler's (1993) study of the Swedish secondary school system, discussed earlier, examined the social field of schooling to consider the division of labor of which gender was a part. They conclude that analyses require a multi-layered positioning of educational studies as they relate to the social fields of work.

Finnish studies have sought to relate issues of gender to questions of social class and inclusion and exclusion. These studies consider exclusion as a problem of marginalization before education and unequal distribution of education.

A number of studies in different contexts focus on the connection between class origin, class destination, and education that are features of postindustrial countries (Boudon, 1974; Erikson & Goldthorpe 1992; Halsey, Heath & Ridge, 1980; Ishida, Müller & Ridge, 1995; Jonsson & Mills, 1993; Lindblad & Pérez Prieto, 1989; Müller & Karle, 1993; Saunders, 1995; Sorokin, 1959). The historically constructed aim of social equality has maintained its position at least on the Finnish discursive level. In 1996, the National Board of Education edited and published a heavy volume on the question "Does the comprehensive school realize equality?" (Jakku-Sihvonen, Lindström & Lipsanen, 1996; Jakku-Sihvonen & Lindström, 1996) The foci in this evaluation were on regional, socio-economic, and gender-related equality. The conclusion was moderately positive but clear evidence of inequality still exists. One of the few studies that revealed clearly negative evidence was made by Valkonen et al. (1996), who showed that the proportion of boys among those without post-comprehensive school studies has decreased. Kivinen and Rinne (1995; 1996) showed in their research that a strong and highly stable social inheritance of educational careers in Finland still exists and that inequality of educational opportunities follows a man through his whole life span.

(4) Cultural Issues of Representation, Ethnicity, and Race

In France, the issue of exclusion is often related to ethnicity and movement to the fringes of the city. The particularly serious school problems identified in the urban periphery of the great metropolises, the *exile quarters* (Dubet, 1992), are the expression of the aggravation of the crisis of the school institution, as a result of the conjugated effect of the urban crisis and the question of ethnic diversity. A view of the issue of exclusion is found in an edited volume by Serge

Paugam (1996). A theoretical discussion of concepts can be found in two articles in the Revue Française de Sociologie (Herpin, 1993 and Fassin, 1996) and in a work on the theories of exclusion (Xiberras, 1996).

Other studies focus on issues of ethnicity, race, and gender in an attempt to understand the relation of educational attainment and qualifications (see, e.g., Gibson & Ogbu, 1991). Ogbu (1994), examining stratification patterns and schooling in the U. S., argues that social differentiation occurs through a complex pattern that needs to be understood through a racial rather than a class theory. Heath and McMahon (1987), as well, focus on the *ethnic penalty*, that is, the sources of disadvantage that lead ethnic groups within Britain to do less well in labor markets than similarly qualified white people.

Swedish studies focus on education as a meeting point for different cultures. Lundgren (1972) showed that, in practice, the teaching process excluded 10-25 percent of the students. Callewaert and Nilsson (1980) analyzed the teaching process based on a structuralist reading of Pierre Bourdieu (1972) and the cultural inequality of this process. Lindblad (1994) reviewed classroom research in Sweden. He found a persistent lack of individualization (a cornerstone in the comprehensive idea) and a superficial equality based on the fact that differences among students were neglected in the teaching process. Lindblad and Sahlström (1998) found changes in Swedish classroom interaction in terms of weaker procedural framing which led to other patterns of student exclusion – as compared to Lundgren and Callewaert & Nilsson – based on the students' instead of the teachers' choices.

Studies in Greece have more recently considered issues of social exclusion as related to ethno-cultural minorities as well as other ethnic and religious groups. One of the foci of Greek studies relates to gypsies (Tsiakalos, 1998). Also, immigrants from Russia and the Balkans (particularly Albania) and laborers from Poland, the Philippines, and Arab countries have produced a range of policy discourses and social science discussions about issues of social inclusion.

(5) Cultural Issues regarding Inclusion of the Disabled

A range of historical and empirical studies have sought to understand the construction and effects of special education. Franklin (1994), for

example, explored historically how the notion of backwardness shifted to a more professionalized concept of learning difficulties and at-risk children in the U.S. context. The resultant discourse of the description of low-achieving and troubled children, Franklin argues, was to provide part of a crusade to give access and to provide strategies for success in schools, but in actuality segregated children with disabilities and did not provide for the intended results.

This interest in the disabled and the problem of inclusion is also found among European countries. Vislie (1997) argues that special educational studies have tended to be organized through the categories that were presented in the so-called Warnock Commission in the late 1970s (p.128) and related to a defining of "special educational needs." Vislie summarizes the research in special education as related to the relative efficacy of integration vs. segregation, and the characteristics and effects of integrated provisions.

In 1996, the NBE in Finland edited and published an evaluation report on the condition of special education in Finland (Blom et al., 1996). The official discourse in special education since 1970s has been integration, which has meant an increase in the volume of part-time special education, but not a decrease in the volume of full-time special education. So the total volume of special education students is by internationally comparison very high, 16% (Kivirauma, 1991; Moberg, 1996.) Although the total volume of the pupils in special education has been quite stable during the last twenty years, the volume in some special education settings has decreased during the 1990s for the first time in the history of comprehensive schooling. According a follow-up study (Jahnukainen, 1997), pupils graduating from special education have entered quite well into further education after comprehensive school. But the drop-out rate is much higher than among the rest of the cohort (Kivirauma, 1995).

(6) The State As an Entity that Governs: The Sovereignty Model of Power

At this point, we move to theories of the state that sometimes ungird the above-mentioned research regarding the equity problematic. These studies have a particular conceptual configuration, particularly when compared to those that will be discussed in the following section on governing and knowledge. In the equity problematic, the

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state is viewed as an entity whose patterns of relations and policies produce governing practices through (a) funding, (b) regulation through policy and law, and (c) provision and delivery (Dale, 1997). The problem of analysis is to understand how these practices qualify and disqualify various social actors. Governance studies of the state are intended to identify the origin of power; that is, the actors in control and for whose benefit existing arrangements work. Power is attached to actors who have the legitimacy to make decisions and allocate values within communities. A central premise of this notion of governance is that society is composed of certain groups, social interests, and "forces" that have historically formed and whose practices dominate and repress other groups (Green, 1990; Torres, in press). The governance may be indirect, through the production of hegemonic practices, but the effect of state practices is to produce and reproduce systems of exclusion.

This part of our discussion of the equity problematic will review this notion of the state with its focus on the legal-administrative apparatus of government and actors/agents of government. This discussion will then provide a way of anchoring the conceptual distinctions within the equity perspective to a particular sets of configurations related to issues of governance. The conceptual anchoring has different sets of foci and relations in thinking about the state than those explored in the following section on the relation of knowledge to governance.

Governance as Actors/Agents: One notion of governance is linked to the legal-administrative apparatus of the state. Most discussions of governance fall within the parameters of the state as a formal entity that intervenes through social, economic, and cultural policies. Such state actions are found in legislation, admission policies of education, and steering efforts of state bureaucracies. The concept of the state as a governing entity is so strong that distinctions of civil society and decentralization cannot be understood without some recognition of the state as a framing actor. The ideas of civil society cannot be understood unless there is at least a tacit notion of the state as a sovereign actor that functions to establish hegemonic will and interests. Decentralization as a concept, as well, assumes a concept of the state as changing its governing practices.

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The notion of the state enables us to consider certain conceptual moves within educational and economic studies of governance that relate to studies for inclusion and exclusion. First, research focuses on the formal institutions and agents of practice and policy with a concern to problems of equity and justice in schools. State planning (and steering) considers how policies effect different groups' access and achievement in the school. Dale (1997), for example, while ordering the problems of research around a concept of the state as a governing practice, reviewed school choice literature to understand their implications. The review, however, centered on formal governmental practices as governing (steering school practices and access) through formal policies and bureaucratic practices.

Governance is viewed as a property of certain actors who act to have their priorities and interests articulated in the public organization of social and cultural life. Such an actor-centered analysis examines the sets of relations and negotiations in which power is exercised and dominance maintained or challenged. In the discussions of state governance as described above, governance is defined through entities – the actors and institutions whose practices steer and organized social life.

Traditionally, this sovereign notion of the state qua power leads to consideration of social policy and educational research through a focus on the problem of inclusion and exclusion as asking about the categories of groups who do and do not participate in institutional life. Social planning is aimed to open spaces for social groups previously excluded so that they participate more fully. This commitment to an inclusive society underlies U. S. reform strategies that range from school choice to efforts to broaden local, community decision-making, to the construction of national goals, such as the goal of inclusion that "every child will come to school ready to learn." These educational policies target population groups that have been excluded and seek strategies to provide a more equitable distribution of participation. The concept of power that underlies this view of inclusion/exclusion, related to the sovereignty concept of power, has been useful in challenging the exclusion of particular groups within society.

This notion of sovereignty and the state is embedded in discussions that focus on expanding governing problems to include practices within civil society. Dryzek (1996), for example, argues that

analysis of governance and inclusion/exclusion cannot restrict itself to state actions. Analysis must focus on civil society as all social interaction not encompassed by the state or the economy (Dryzek, p. 481). The state may not be the site of democratization, but we must look to civil society, since a certain degree of exclusion in the pattern of state representation may be desirable if civil society and democracy are to flourish (p.482). For example, the corporatist state model was conducive to a democratic civil society since it included groups previously operating in civil society – first the bourgeoisie and later the workers. But today the circumstances of changes within environmental and women's movements have forced a revision of the relation of civil society to state democratization, especially if it means a tripartite arrangement (p. 483). Thus, new strategies are needed to understand the problem of governance as related to inclusion/exclusion.

To be schematic here, the study of power has been to identify its origin; that is, the actors who control and for whose benefit existing arrangements work. The search to understand the **actors** who wield power introduces a view of power as *sovereignty*, that is, which groups are favored in decision-making and how the decisions distribute values to produce a context of domination and subordination – that of the rulers and the ruled. A central problem of research is to identify (and alter) the unequal relations between the rulers and the ruled. Research is supposed to identify groups, social interests, and "forces" that have historically dominated and repressed other groups. Power in this conceptual landscape is "something" that people can own, and that ownership can be redistributed among social groups that challenge inequities; hence the use of the term "sovereignty." For example, a sovereignty notion of power is embodied in educational literature that "sees" the consequence of school reforms as reproducing hierarchies in society which cause gender, racial, and class distinctions in society (Carlson, 1992).

This notion of governance makes the legal-administrative apparatus of the state a central concern in the operation of power and the production of inclusion and exclusions. Esping-Anderson's (1996) discussion of changes in the welfare state follows this pattern of defining power and governance through the effects of the administrative-legal apparatus of the state welfare policies on the relations in the social welfare net and the labor practices.

Early Equity Studies and State Practices for Social Inclusion: The twin goals of national development of global economies and a more inclusive society have increasingly pointed to the importance of education in meeting the modernization tasks of the modern state. Halsey et al., (1997) argue, for example, that post-World War II education took a central position in the functioning of the advanced industrial society as a key investment in the promotion of economic growth and social justice. This position has increased with the new centrality during current globalization – the competitive advantage of a nation is defined in terms of the quality of its national education and training systems judged according to international standards. The state has sought to make a tighter relation between economy and work, particularly in post-Fordist economies that call for highly educated workers (Brown & Lauder, 1992).

Early studies of the relation of the state to issues of equity maintained this focus on legal-administrative governing practices. Historically, studies of inclusion and integration have been viewed as a way of steering educational governance to produce an economically more equitable society. One of the best examples of this is Swedish research. The early research on social inclusion in Sweden, for example, turned its attention on the extent to which different categories in Swedish society obtain access to educational opportunities (see, e. g, Husén, 1969). However, the idea that education served as an instrument for increased social mobility was questioned in a number of quantitative studies. Härnqvist (1978) showed that the transformation into a non-selective education system demonstrated patterns of students' (and parents') self-selection that was quite similar to the system where students were selected by the school. The same conclusion was presented by others (e.g., Jonsson, 1988). Implications of social segregation for education were presented by Arnman and Jönsson (1983). Arfwedson (1983) presented the notion of school codes, where patterns of traditions and interaction with segregated school surroundings produced different – and socially biased – school cultures. Studies in Scotland, however, which examined the Scottish comprehensive school reform between 1945 and 1970, found that such schools did reduce SES segregation in schools (McPherson & Willms, 1997).

Shifts in State Ideology, 1980s-1990s: The question of an equity perspective on social exclusion and inclusion is still important cross-nationally while there have been shifts in the focus of the relation of the state to social practices. The political and ideological shifts in the 1980s and 1990s, it has been argued, – a shift with profound consequences for education – have forced educational researchers to confront new questions. These do not only concern those who are selected or omitted from participation in e.g. higher education and working life, but also an analysis of a new state discourse of educational governance in schooling and the actors who set up the political agenda and the rules of debate and interpretation. (For a comparative approach in the UK and Sweden, see contributions in Kallós & Lindblad, 1994, for a contrast and analysis of the educational policies, strategies, and concepts of the Social Democratic and non-Socialist governments of the late 1980s and early 1990s).

A more detailed analysis of the changing discourses of educational policy in the political arena from the late 1970s to the beginning of the 1990s was made in Sweden by Lindblad and Wallin (1993). They discuss education as both a product and a cause of the transformation of the old centralist welfare state, insofar as citizens do not perceive the old forms of governance as legitimate any longer (Lindblad and Wallin, 1993), calling for pedagogical governance strategies and research that recognize differences based on e.g., social origin, gender, and school experience between different actors. *From which positions will we hear voices and silence? And who will exit?* (Ibid., p.84; also see, Schüllerqvist, 1996).

In Iceland, Finnbogason (1995), among others, focused on the decision-making processes behind the Icelandic compulsory school reform in 1974. The study is a description of the interest groups and action frameworks in which different actors functioned to determine the form and content of the comprehensive school. Proppé (1983) studied the methods of educational assessment and the conflicting function of the educational system.

At one level, changes in the governance practices have been explored through examining the policies of "neoliberalism." The political and academic arguments construct governance as a lean state that retreats from intervention except for creating conditions for individual agents to act on their interests. This set of research projects

explores how policies of marketization and privatization of public sector activities have affected educational performances and outcomes (Chubb & Moe, 1990, 1992; Osborne & Gaebler, 1992).

Other research has sought to understand the implications and consequences of neoliberalism as an equity principle related to inclusion and exclusion (Ball, Bowe, & Gewirtz, 1995; Grace, 1997; Walford, 1994, 1997; Whitty, 1997). In Great Britain, for example, Whitty (1997) reviewed the existing literature on marketization and privatization as having mixed results in relation to issues of equity. In some instances, various groups already seeking social mobility use school choice; in others situations, middle class groups use school choice as a strategy to maintain their social positions.

While there are no clear-cut understandings of these effects, the premise of this research is to understand how a new state-individual relationship is originating through neoliberal policies, a relationship that is different from that of previous welfare policies. There has been extensive literature in Sweden and Britain, for example, concerning neoliberal ideas of governance, a label attached to shifts to more market types approaches within education. In Sweden, Englund (1996) analyzed the (re-)emergence of a pluralistic school system for the private good that was gradually replacing the former equity-based school system for the common good, and the fears that the result of the pluralistic system would be a return to a former, strongly segregated, society. Englund also discusses the new rhetoric of an educational ideology stressing education as a private good (Englund, 1996a, b).

This view of the governing functions of neo-liberalism is also one of contention. While there have been rhetorical statements about *rolling back* the state, there is little evidence to support this (Boyer & Drache, 1996), despite subtle changes in the allocation of resources and the governance politics related to the "risk" factors of modern societies. Comparative analyses of political economies, for example, have illustrated how global economics have weakened the state's monopoly (sovereignty) in that sector but have simultaneously produced new cultural forms as pragmatic responses to the reduction of public funding and local specific pressures created by economic, demographic, and social needs (Bakker & Miller, 1996).

By viewing the governing practices of the state as part of a broader historical set of changes in the relationships in the political economy,

it is argued that a more nuanced theoretical outlook is required than can be provided through the use of the political categories provided in neoliberal ideologies, such as those that focus on centralization to decentralization, welfare state to low-profile state, or ideas about the crisis of governing (Jessop, 1998; Boyer & Drache, 1996; Kallós, 1996; Popkewitz, in press). In these latter arguments, the focus is on new systems of governance being produced through new sets of social and economic relations and discursive formations that are not adequate explained through arguments about the loss of the welfare state or privatization (Deleuze, 1990; Dean, 1997).

Centralization and Decentralization Policies: Certain research has looked at the new sets of governing relations between the state and localities as more centralized systems assume decentralized patterns. These research programs have sought to examine such aspects as who benefits or loses when school choice is initiated in local settings where financial responsibilities are given to municipalities. Some of this research is cited below in the discussion of education and class.

It is with the emergence of decentralized policies that many researchers have shifted foci, particularly in northern European nations where issues of governance were earlier out of the purview of research. One type of argument in the discussion of the change in governance practices as neoliberal policies and decentralization practices are implemented relates to the idea of "governing at a distance." The introduction of state policies that decentralize social and educational practices with an aim to give local authorities greater participation in determining funding, regulation, and provision is one example. This shift in institutional relations and actors has instigated new types of studies to consider the implications of the new relations between the legal and financial center of state government and local, regional, and municipal decision-making.

In Finland, for example, research on government was not previously a particularly popular theme in the Finnish academic field of social studies and even less in education (Tiihonen, 1994; Hovi, Kivinen & Rinne, 1989). The historical change toward decentralization in education has been the subject of only a few smaller studies (Kivinen & Rinne, 1991; 1992a; 1992b). Konttinen (1995) locates the change in education governance in the late 1980s. Since then, centralized decision-making and a rational, top-down innovation strategy has been replaced by increasing self-regulation

and decentralization first and foremost in the field of higher education but also elsewhere. In this process, there has been a move from "assessment to evaluation," where the loose link between central educational authorities and evaluation research has been essential. Laukkanen (1995, 1997), a senior inspector from the NBE, describes the new Finnish education governance in relation to evaluation system. He characterizes it as a "managerialist approach" where a distinction is made between policy-making and implementations, local-level agents are allowed greater latitude, and an emphasis is placed on efficiency and effectiveness. The extra latitude given to local-level agents, however, does not mean that the central government is not concerned with education, only that the governing mechanism in Finland becomes one of "information steering" in which educational evaluation is of greatest importance.

There is also a growing interest in the problem of governing that relates the nation-state and intrastate agencies. These studies consider the relation of global discourses about education and the construction of national systems of governing education. Proppé, Mydral & Daníelsson (1993) examines the changing historical organization of schools in the post-World War era as new notions of "teacher professionalism" and "centralized decentralization" align with the emerging pan-European landscape in the global economy. The particular discourses of governing through teacher professionalism are understood as mingling with local cultural/political discourses in a rapidly changing national context (Myrdal, 1996).

While the existing research can define a relation between education and economics heuristically, no specific links have been established between education and economic productivity because of the difficulty in demonstrating causality. Furthermore, while there are increasingly discussions about the state, government, and governing, it is important to reject several simplistic dichotomies, such as market vs. hierarchy in economics, market vs. planning in political policy, private vs. public in politics, and anarchy vs. sovereignty in international studies (Jessop, 1998).

Governmental influence as more negotiated/the state as more than state steering/Ingrid Carlgren's description and analysis of how the formulation of educational goal documents is affected, behind the actors' backs, by the introduction of a new discursive field give new

insights into an analysis of steering documents, which is part of the EGSIE project.

Carlgren's (1995) study of the steering mechanism in the development of the new Swedish national curriculum of 1990 is an example of this particular strand of policy studies. Her analysis begins with an autobiographical discussion of her role as a participant in the expert committee appointed to develop the curriculum. However, she moves on quickly to historicize and textualize the practices of the expert committee, and to consider the way in which the state steering mechanism of schools is bound to deeper paradigmatic shifts in how Swedish society conceptualizes school knowledge and teaching. She demonstrates, for example, that the new curriculum represents a shift in priorities and emphasis regarding school subjects. At a different level, she points out that Sweden's shift toward a decentralized school system in fact reduced the scope of teachers' decisions and actions through the new requirements of school subjects and the practices of the new National Agency for Education, *Skolverket*. These changes, Carlgren argues, re-worked and reconstructed traditional rules concerning what is said and written about in schools. Carlgren argues that the debates were framed around old categories of schooling (such as changes in the timetable) in a way that obscured the more fundamental agenda.

To summarize this section, we have explored a particular orientation toward governance and inclusion/exclusion that we have called an *equity problematic*. Its central purpose was to focus on the practices that include or provide access and participation to groups and individuals in social and institutional processes. In the literature, inclusion and exclusion are viewed as distinct categories, and social policy is concerned with providing a more inclusive social fabric through policies that govern institutional and structural relations within a society. Categories of inclusion/exclusion are formulated typically in relation to class, race, ethnicity and gender, although the concept of the disabled also has a place within school discourses. We argued that the *equity problematic* posed a particular notion of power related to issues of dominance and repression, that is, how existing organizational and ideological factors influence participation and conditions in the allocation of values in a society. Governance practices in the literature are then related to how greater equity can be

achieved in social and institutional life, with the relation of state to civil society a major element in defining policy and research foci.

Governance and Social Inclusion/Exclusion as a Problem of Knowledge

A different view of the relation of governance and inclusion/exclusion focuses on how the knowledge of the educational field produces distinctions and divisions related to action and participation. In contrast to the equity problematic which focuses on participation or representation of groups or individual, the problematic of knowledge provides a different focus to questions of access and participation. This research strand is concerned with the historically specific rules and standards of reason that organize how individuals conduct themselves as productive actors. A review of this literature involves exploring the rules and standards of conduct or reason that function as governing principles of action and participation. These principles of knowledge and the reasonable person are considered political since they work in everyday life to qualify or disqualify individuals for participation. Inclusion/exclusion here, in contrast to the equity approach, does not function directly through the identification of the categories of groups represented in decision-making, such as women studying mathematics. Rather, issues of inclusion/exclusion are found in the principles of reason and conduct that classify, differentiate, and divide subjectivities of actors and agents through practices of normalization.

As another contrast, whereas the equity problematic literature views governance as a negative, repressive notion of power, this problematic of knowledge views governance as the rules of conduct involving the productive aspects of power (Dumm, 1996; Foucault, 1980; Simons, 1995; Owens, 1996). Governance is a consideration of the ways of conducting conduct, that is, the ways of acting on the actions of others through calculating the direction and principles of conduct. It is the structuring of the field of possible action by rendering conduct calculable through inscribing the principles of performance and modes of subjectification (Dean, 1995,1996). Inclusion/exclusion thus relates to the ways in which the systems of governance produce systems of classification and order that qualify

and disqualify individuals for action through the inscriptions of discursive divisions and normalization.

This second notion, which links governance to inclusion/exclusion, relates to Foucault's (1979) idea of governmentality. In the 19th century, Foucault (1979) argues, a new relationship arose between state governing practices and individual behaviors and dispositions. If the state was to be responsible for the welfare of its citizens, he argues, the identity of individuals had to be linked to the administrative patterns found in the larger society. This embodied a power/knowledge relation. New institutions of health, labor, and education tied the new social welfare goals of the state to the self-reflective and self-governing principles of individuality (Donald, 1992; Hunter, 1994; Rose & Miller, 1992; Shapiro, 1992). The notion of "socialization" is reconceptualized as Bourdieu's (1984), and before him Durkheim's and Weber's, *habitus*, from the anthropological universe of functional sociology to the outcome of specific social practices through which subjectivities are constructed.

This section reviews the literature through six distinctions related to the problematic of knowledge. They include: (1) governance as map-making; (2) changes in political projects from social, utopian ones to the political as bound to cultural projects; (3) fabricating identities; (4) producing cultural territories of nation-ness and citizenship-ness; (5) governing subjectivities and the production of gender, ethnicity, and class; and (6) the state as the set of relations that govern conduct. In exploring these five distinctions, we explore a different way of thinking about the relation of governance and inclusion/exclusion that complements that of the equity problematic.

(1) Governance as Map-Making

There is a literature that relates issues of governance and inclusion/exclusion through thinking of knowledge systems as *map-making* (Anderson, 1991; Goodman, 1978; Douglas & Hull, 1992). In the same way that a road map tells us about distances and routes for travel, a discursive map tells us symbolically how to order the objects of the world for scrutiny and practice. If we take some of the categories of inclusion and exclusion discussed in the equity problematic, for example, we can think of the categories as embedded in a map that tells us what lies within the normal and, at the same time, what lies outside the normal. The distinctions of gender, class,

and ethnicity are most prominent in thinking about the structural qualities of groups who are targeted by governmental policies. Various categories internal to pedagogy are learning disadvantaged, needy children, at-risk families, and the disabled. These categories of policy and pedagogy are not merely labels ascribed to groups of people to think about and order classroom practices to produce a more inclusive system of education. They function to divide children's subjectivities through mapping what is normal in the sense of inner capabilities that govern action.

The significance of the discursive maps in a problematic of governance and inclusion/exclusion is as follows. The discursive systems signify the capabilities, sensibilities, and dispositions that are included as normal and reasonable for action, and, by the absences of distinctions, what is deemed as unreasonable and thus to be excluded. But the significations function as social practices rather than only words and ideas that refer to other practices or structures. The distinctions of gender or class, for example, are studied to understand how they are produced and construct spaces by which individuals are to see themselves and reflect on their own competence and achievement.

Governing in this problematic is related to the principles of reason constructed to discipline and produce an individual's own involvement in the world. It also refers to the ways in which subjectivities are produced through the concrete governing principles of knowledge (see, e.g., Foucault, 1979; Dean, 1991, Simola et al. 1998; for a discussion of the first and Walkerdine, 1988; 1990, for studies related to the second notion that relates knowledge to governance). Governance is the ways in which systematic forms of pragmatic knowledge – the practical rationalities of daily life, know-how, expertise, and means of calculation – structure the field of possible actions and participation. Dean (1996), for example, argues that auditing is historically a form of governance in the production of subjectivities. While the auditing of businesses seems a form of neutral and independent monitoring, auditing people acts on how they engage in their own conduct as something that is testable, monitorable and calculable. Auditing, according Dean, is an active intervention into organization that reshapes people's activities according to the norms of a fundamentally opaque and non-democratic expertise. The practice of auditing transforms the conduct

of the auditee by rendering the activities of the person visible in terms of standards of performance or the identification of risk (p.62). Auditing becomes a way of reasoning that reshapes the conduct of professionals and organization by asking that the standards of performance function as a technology for evaluating individuals. Auditing governs problem-solving as it inscribes the rules for discovering critical problems for the organization and the person (p.63).

Auditing, then, is not only an accounting system but a governing practice that constructs an individuality. It is also a system of a condition of a particular form of life and social and political organization, patterns of communication and action, professional expertise, methods of training, and that which once made a regularized element in social life becomes governing on patterns of innovation. Furthermore, such systems of reasoning function within an assemblage of practices to form governing patterns. If we think about the auditing function, its ideas interweave with an assemblage of ideas about economic management, the competitiveness of the national economy, social welfare practices concerned with poverty, and ethical and moral practices dealing with the morale, attitude, and outlook of the population.

It is in the differentiating and dividing practices produced in this field of ideas that have material consequences in relation to systems of inclusion/exclusion. If we consider the educational field as a problematic of knowledge, pedagogical discourses establish a continuum of norms that place some children outside the range of proper norms of thinking, reasoning, and acting. The mapping of learning disadvantaged, needy, at-risk and urban or education for the needy position the children who are classified as such as somehow different from something that is not, for example, needy or at-risk. In a U.S. study of education and teacher education for children defined as in need of special help because of poverty and discrimination, discourses of urban and rural education were deployed in a manner that placed the children in a social space that constructed them as not having the sets of dispositions and sensitivities needed for being productive. It was the *absence* of the norms embodied in the ideas of remediation and disability that worked to produced identities that excluded children from action (Popkewitz, 1998). If we play with language here, the absence of the norms in the child also becomes a

presence to govern the construction of teaching. This relation deploys the term governance in a different way than previously in the discussion of organizational policies and procedures of access and equity.

The relation of governance and inclusion/exclusion in the educational field has a particular social and political significance. It directs attention to how the knowledge inscribed in conceptions of the educated person qualifies and disqualifies individuals from participation through processes that normalize the being of the child. It is the making of the dispositions, sensibilities, and awarenesses that are valued and made to seem normal for the being of the child that constitutes the systems of inclusion/exclusion. Walkerdine (1988, 1990) studies of Piagetian psychology in education and progressive pedagogies, for example, illustrates how particular bourgeois and gendered ways of reasoning are brought into the school as seemingly universal and neutral sets of practices but which function to create divisions that exclude certain children from participation.

This view of governance and inclusion/exclusion, then, places emphasis on the production of reason that orders the rules of participation rather than on the overt representation of categories of groups found in the discussion of the equity perspective. Our review of literature in this section will be to recognize how the problematic of knowledge is complementary to the problematic of equity in thinking about the relation of governance and inclusion/exclusion.

(2) From Social to Cultural Projects in the Construction of Inclusion/Exclusion

Current literature that cuts across the disciplinary perspectives of the sociology of knowledge and cultural studies has argued that discussions of changes in the welfare state involve a significant shift in the meaning of politics related to inclusion and exclusion. This literature argues that there is a shift toward cultural rather than social patterns of governing (Dean, 1997; Deleuze, 1990; Deleuze & Guattari, 1977).

It is argued that previously, the operative metaphors of social planning since the late 19th century were related to *social, collective projects* (see Rose, 1996). Planning embodied universal, "social" solutions for the social question of deficiencies in social reality. Urban planning rationalized the city by identifying ideal patterns for

social movement and the administration of the city. Sociology focused on issues of social control (in the sense of institutional planning) to improve the life situation of the poor (Franklin, 1987). Psychology treated achievement as if it were institutionally fixed and separate from action. Fordist and Taylorist models of production, ideas which extended as far as the Soviet Union, were built on conceptions of common roles, fixed identities, and defined parts that were interchangeable in assembly line production. Not everyone would agree with Taylor's assessment of the function of studies of movement in assembly line work, but he believed himself that his ideas about redesigning production would emancipate the worker! As with other social projects, teacher training and pedagogy focused on the implementation of *social, collective projects.* Theories of pedagogy and childhood constructed universal notions of the citizen that ascribed universal values from which to forge the productive citizen and worker. Turn-of-the-century social notions of citizenry and nation-ness inscribed a particular image of the productive citizen through pedagogical theories and research about child development and teaching (Baker, 1998; Kliebard, 1986).

From this literature, one can understand the current discourses about cultural identity as forging a new sense of collectivities that culturally binds the individual subjectivities to larger social/cultural entities. This literature refocuses the attention to issues of governance in policy discourses of neoliberalism by considering how the metaphor of community has been introduced to replace social collective projects as emancipatory. If one re-examines earlier discussions of changes in the welfare state, there are discourses of community health programs, community schools, and community-based welfare systems (Rose, 1994, 1996). Debates about multiculturalism in different national contexts, often with different national points of references about inclusion and exclusion, maintain images that reflect this shift to community as the operative metaphor of change.

Problems of inclusion and exclusion are viewed as cultural struggles that relate to producing narratives and images of who the child is to "be" – the production of *subjectivities* (Bulter, 1996; Chatterjee, 1993; Schram & Nelsser, 1997). Unlike the equity problematic, which focuses on representation and access of groups in institutional life, attention is instead directed to less obvious cultural

questions of the rules for construction representation, national identity, and citizenship that are embodied in the educational restructuring. Pressures produced by global changes in economy, by political changes as minority groups seek greater participation, by issues of racial equality, as well as by changing migration and demographic patterns across nations have redefined the debates about the nature of nationhood and citizenry. The struggles over identity that are now existing over minority rights and gender, for example, have produced new exclusions and taboo zones, as monolithic notions of identity clash with the convictions of identities that are heterogeneous.

The politics of culture are found in debates about educational policy and pedagogy. The struggles about the images of a nation and citizenry today, in contrast to the past, are located in the arguments about the professionalization of teacher education as well as in response to conceptions of childhood, curriculum, and learning. Social and historical research in Finland, Spain, and Sweden suggest that the discursive practices of education are re-envisioning the nature of the child as an active participant in community and cultural practices (Hultqvist, 1998; Simola et al., 1998; Popkewitz, 1993; Popkewitz, in press-b).

This shift of the political to cultural projects has historically re-constituted the projects of inclusion/exclusion, according to Rasch (1997). He argues that the utopian projects of the past century were social and gave attention to the inclusion of the excluded (the proletariat, the third world, women). Rasch further argues that the utopian politics that would claim to give voice of the excluded other for the sake of egalitarian inclusivity has been a constitutive impossibility. Rasch (1997), for example, drawing on the German sociologist Nicholas Luhmann, opposes the political reading of exclusion as part of a psychology and sociology of victimology, where the excluded are personified as a class, or some other form of human collectivity, and thus mourned. Rasch continues that such utopian projects are no longer proposed as the base of an emancipatory political program. Rather, Rasch argues that inclusion, even the inclusion of the oppressed other, is predicated on exclusion. The challenge in contemporary politics and research, he continues, is to think of exclusion through alternative logics that are not compromised by utopian projects of the past. The problem, he

continues, is not to look for functional differentiations but to a negative integration, a form of supercoding, a superimposition of inclusion/exclusion distinction over modernity that looks for the hidden guest lodged within the heart of modernity.

This notion of governance as circulating through the governing of the conduct of conduct is present in Francophone literature. Current school problems are understood, not as transitory dysfunction, but as the expression of a crisis of legitimacy in the link between the socialization functions of the school and the unity of the state-nation, thus inscribing a seeming coherence between the political system and a system of values. The crisis of the traditional socialization instances has put into question the classical model of normative integration based on a conception of socialization perceived as mere constraint external to the individuals. The inner coherence of the school institution unity, which has for long assured the success of the classical normative integration model, has been progressively replaced by a school that combines analytically independent functions to which different logics of action correspond (theoretical contributions to this discussion can be found in Dubet, 1994: Dubet & Martuccelli, 1996a, b). These authors explore the concept of the construction of school experience as producing new modes of regulation of the educational systems, as the expression of a new relationship between education and the communal (Charlot, 1994). Educational policy and practice follow a different space inscription and cease to be merely deducted, to become constructed at the local level (Charlot and Beillerot, 1995). The development of partnership-based territorialized educational practice configures a metamorphosis on education (Cardi and Chambon, 1997).

(3) Fabricating Identities

Related to the idea of map-making is a literature that explores how identities are fabricated and differentiated through the categories and distinctions that order and divide people. This fabrication, the making up of identities, is illustrated by an important article by Ian Hacking (1986). Hacking starts by questioning the idea that before the latter part of the 19th century, there was no notion of perversion and no idea of individuals as perverts. Hacking then goes on to inquire into how the ways that we categorize, differentiate, and distinguish among people produces social identities that intersect with our very idea of

what it means to be an individual. Hacking considers this making up of people as an interplay between new realities which effectively come into being and the discursive principles through which that reality is constructed, such as the identities produced through medico-forensic-political languages of individuals and social control of the past century.

The importance of the making up of people, according to Hacking, is that it has not only to do with what people did, do, and will do but also with what they might have done and may do. That is, the making up of people changes the space of possibilities for personhood [229]. His example is the institutionalization of the homosexual person in law and official morality that in turn produced a life of its own. The fabricated identities that are placed outside normalcy and reason also function as a counter-memory as expressed in the organization of the gay liberation movement.

The fabrication and making-up of people provide a pause to social analyses in which the problem of inclusion and exclusion are central. To grasp this historical problem of making-up people, the problem of research is not only to identify what is made visible through official reports and policy discourses but also to identify and study what does not appear in the official maps of policy making and research.

The idea of fabrication focuses on the ways in which the educational practices assign identities or form subjectivities prior to the actual measurement of population groups that appear in the official statistics of school leavers or other markings of transitional points. Danziger (1990) explores the emergence of 20th century quantification and statistics in the historical development of psychological research producing its subject through the techniques employed, such as through statistic inferences and the ways in which survey and interview instruments are constructed. Moving through European, continental, British, and American contexts, Danziger focuses on how the social techniques through which a study of personality, learning, and the mind appears also constitute the individuality of the person through statistical inferences. Baker (1998) examines the child study movement in the United States at the turn of the century in order to consider how identities of the normal child were constructed through discourses of development and learning, with these normal identities inscribing divisions that placed African-Americans and girls as outside the systems of reason.

McCallum (1990) focuses on the concrete strategies of organizing Australian school populations to provide an efficient and outwardly fair structure but whose categories of vocational guidance and use of industrial psychology, for example, produce student identities that give rise to social differences and systems of exclusion.

(4) Producing New Memories and Forgetting of Nation-ness and Citizenship

The idea of fabrication can be extended to consider how cultural narratives and schooling produce national (and intra-national) imagineries through which individuals locate themselves in a larger sense of collectivity. This literature calls attention to how there is no natural national community, but one that is dependent on the discourses that form individuals into the seam of a collective narrative (Balibar, 1991, p. 49; also, Huyssen, 1995). Anderson (1991) has called this institution of an imaginary unity an imagined community, one in which cultural representations are historically fabricated to produce a concept of nation-ness. The narratives and images in policy, history, and the social sciences are not regaining national memories, but producing new memories as well as ways of forgetting (see Jehlen, 1986; Wald, 1995; Rabasa, 1993). Huyssen (1995) argues that the past is not simply there in memory but it must be articulated to become memory. Memory is *recherché* rather than recuperation (p. 3).

This recognition that national memory as a construction of the past in the present has important implications for the study of governance and inclusion/exclusion. The school has historically played a pivotal role in constructions of national representations and the structuring of systems of inclusion and exclusions (Meyer et al., 1997). Current revisionist histories of national and European identity that look either nationally to the contributions of different social and ethnic groups within national narratives or to a pan-European sense of self, for example, are not merely moving toward a more truthful representation of the past. The restructuring of cultural memories are a cultural practice of the present that forges narratives to instantiate visions of the citizen, the nation, and the new intra-national state of the European Union. The discourses about the traditional values and conservative restorations, for example, have little to do with what the past was; the discourses construct new sets of collective

representations and principles for action and participation. The cultural images and narratives of a national family and traditional values of collectivities and individuality exist sooner as part of present constructions than as past realities.

The different cultural practices to produce national imagineries are, as Huyssen (1995) reminds us, the production of memory. But that cultural memory of self is not just the result of a somehow natural generational forgetting that could be counteracted through some form of a more reliable representation. Rather, it is given in the very structure of representation itself (p. 3).

But the new cultural practices in the restructuring efforts contain ambiguities and contentions as the new cultural territories are assembled (see, e.g., Chatterjee, 1993; Rose, 1996; Shapiro, 1997; Wald, 1995; Balibar & Wallerstein, 1991). At one level, old images of nation and self are dissociated from the new memories as people re-imagine themselves with a new collective narrative that relates to political projects bound to cultural identities. The estrangements are found in multiple countries as educational reforms shift the narratives of curriculum and the child to embody new imagined cosmopolitan identities that embody pragmatic flexibility and problem-solving abilities (Gee et al., 1996; Popkewitz, in press-a). In part, the imagined unity of the new child in teaching and teacher education is instituted against other possible unities, interpretive contentions, and analytic capacities of people.

These estrangements and anxieties produced through the new cultural images, narratives, and sagas of nation-ness embody systems of reason through which individuals are organized and classified as fitting in (and are maps on which those not mentioned are placed outside) and reasonable persons. Thus, embedded in the national imagineries are systems of representation that have consequences for social inclusion and exclusion.

(5) Troubles in the Categories of Gender. Ethnicity, and Class

If we return to the equity problematic, inclusion/exclusion is given attention through structural categories, such as that of class (the most frequent distinction), gender, ethnicity, and race. These categories stand as universals that speak of a unification of a specific grouping of people within a single place from which to consider issues of equity and justice. This problematic has served a useful function in

identifying groups that have been excluded from opportunities and access of social resources. In contrast, if we move to the literature which is centered in the problematic of knowledge, we find that the idea of single, monolithic identities are challenged through the concept of hybridity, that is, as an overlay or scaffolding of different discourses through that subjectivities are produced (see, e.g., Gilroy, 1993; Young, 1995; Anderson, 1991; Spivak, 1992; Dhillon, in press). The idea of hybridity is underscored in the formation of political agendas for the new South Africa. Its politics embody fluid and pragmatic relations within a field of multiple power relations. The results are practices that are a residue of Marxism, a spoonful of Chicago economics, a dash of West European social democracy, and much local spice. In a word, like post-communists everywhere else (Ash, 1997, p.33).

The concept of *hybridization* makes it is possible to think of problems of governance and inclusion/exclusion through examining the plural assumptions, orientations, and procedures in which state educational practices are effected. The hybridity of discourses is evident within the political imaginary of European Union unity. Current reforms give reference to Europe as a continent of diversity, with some countries inside the Union built by the Maastricht Treaty having different national traditions of reasoning about social policy and others outside the walls (see Nóvoa, in press; Silver, 1994-95). The production of systems of governing systems of education can also be understood as a hybrid. The current reform policies embodying complex scaffoldings of techniques and knowledge are not exerted though fixed strategies and hierarchical application of power that moves uncontested from the center nations of the world system to the peripheral and less powerful countries (Dussel et al., in press). For example, Argentinean reforms embody processes of mediation and transformations of the space of political rationalities to the modality of techniques and proposals that are used in particular locales (Dussel et al., in press). Thus, while the rhetorical constructions of today's reforms speak of giving marginal groups voice in schools, there is no natural voice. There are only mediated distinctions and divisions which are the historical effects of multiple discourses through which subjectivities are constructed. The construction of voice is an effect of power and never outside of the power relations in which it is positioned.

Hybridization, then, provides a way to consider the interrelation of discourses of class, race, and ethnicity, for example, in the production of divisions. Hybridity provides a way to consider the analytic of governance as not merely one of hegemony and the dominance of the powerful over the less powerful – a power that moves from the core nations to the periphery. Nor is it to suggest that there is some non-European voice that exists in some pristine state to be deployed to counteract the colonialism of the European. As recent historical discussions of colonialization illustrate, there are slippages and processes of translations of ideas of the colonial metropolis as discourses are re-articulated in contexts different from where they were originally produced (see, e.g., Moore-Gilbert, 1997). At the same time, the metropolis is itself reconstructed in a manner that is still relevant today. Europe, for example, was created by its imperial projects as much as the colonial encounters were shaped by conflicts within Europe itself (Cooper & Stoler, 1997). The inclusions and exclusions through which the 19th century European nations refashioned notions of citizenship, sovereignty, and participation cannot be adequately understood without exploring the relation of European practices to Asian and African political movements as well as self-doubts about the moral claims of liberalism in the face of the colonial enterprises.

The shift in focus can be identified in studies of race and multiculturalism in the United States. Fraser (1992), for example, explores the Senate hearings concerning the sexual harassment charges against the now U.S. Supreme Court Justice, Clarence Thomas. She argues that Thomas' claim that the hearing was a "high tech lynching" discursively positioned his accuser, the black woman lawyer, Anita Hill, as a white man who lynched rather than as a black woman lawyer. This occurred by tying Hill symbolically to the historic lynching of black men who were accused of assaulting white women. The Senate hearing involved discursive relations that produce gendered, raced, and classed identities. In this analysis, the agent is problematized because racial and sexual identities are not stable and fixed.

Fraser's argument about the construction of race allows us to understand major distinctions in contemporary social and educational research. The equity problematic of inclusion/exclusion typically studies this through the ascription of categories, such as those of race,

class and sex. That research identifies differences in economic status, educational background, and cultural background as producing differences in schooling. Issues of inclusion/exclusion then relate to how the playing field can be leveled so all actors can be equally represented in textbooks or in school decision-making. These modern theories do not problematize the agent; racial, sexual and class identities are assumed.

Here, we can think of post-modern social theories as revising the "politics" of inclusion/exclusion. The historical construction of the subject is located in literature that examines the idea of blackness and woman-ness. Gilroy (1993), for example, explored how the concept of blackness has historically developed through migrations among places in the Atlantic among Africa, Europe, and the Americas through exploring discourses of social analysis, music, and the arts. Feminist scholarship has, as well, sought to understand how, at different historical times, women are made into subjects through a weaving of different social practices and institutional patterns. Riley (1988), for example, locates how changing concepts construct the "subject" of women in changing patterns of power that normalize gender relations. She explores how the concept of "women" has shifted during the past few hundred years from its placement in religious spaces as a "soul" dominated by the church to social spaces that re-visioned women through their bodies and sexuality. Riley argues that there is no "essential" concept of woman, only one that is formed historically in power relations.

Francophone literature has developed a corollary line of investigation that considers the production of school exclusion as related to the production of subjectivities through the knowledge that circulates within the school context (Chaveau & Chaveau, 1995; Payet, 1997; Bouveau & Rochex, 1997) in the ZEP (Priority Education Zones) policy field. Slightly less recent empirical investigation, now considered classics of the Francophone production in the study of the relationship between the social and school exclusion process and the construction of juvenile identity, are Dubet (1987) and Dubet (1991).

From a historical perspective, Simola (1997) has studied systems of exclusion and education through the examination of the pupils' behavior in their school reports. Since the 1970s, there has been a shift in the focus of the examination from external to internal

behavior. An innovation of the 1990s is the variety of self-selective techniques.

While recognizing that our social world involves an unequal playing field, social theories pay attention to principles that qualify and disqualify individuals for action and participation. Bourdieu's (1984) study has enabled us to think of the production of differences through the differential systems of recognition and distinctions which divide and organize people's participation. For example, Bourdieu examined the systems of recognition and distinctions among French primary teachers, secondary teachers, professionals, and engineers in how they "appreciated" art, organized their homes with furniture and art, as well as made choices about food, movies, and education. These patterns of distinctions and appreciations were different from those of, for example, office workers and small shop salespeople. Bourdieu's study helps us to understand the construction of an unequal "playing" field in the sense of the systems of recognition through which individuals are qualified and disqualified for participation. For example, an anomaly that repeatedly appears in U. S. educational discussions is the high value that parents from different social and cultural groups give to the education of their children, although there is differential achievement among the groups. If we take Bourdieu's ideas about systems of recognition, we can recognize that the distinctions available for action and participation in schooling are not the same among different groups, including the distinctions given when education is "valued" and understood (see, e.g., Sieber, 1981). If we focus on current social policy as related to school choice, we find that its limitations as a strategy of inclusion can also be considered through focusing on the dispositions and distinctions about education that are made available among different groups within a social field. "Choice" assumes erroneously that the options are equally available for all individuals.

(6) The State as the Relations that Govern Conduct

The idea of governance in this section involves a different idea of the state; not as one entity but as sets of relations through which governance practices are constructed (Popkewitz, 1996). Such analyses are less centered on the actions of actors and more on how systems of reason are overlaid in centralized and localized

organizations to govern what is possible and not possible in the fields of social practices (see, e.g., Ball, 1994; Bernstein, 1990).

Icelandic studies, for example, have given attention to the state as a network of relations among actors and knowledge. They have focused on the relation of curriculum knowledge as systems of inclusion and exclusion through the forms of knowledge selected. Gunnarsson (1990), for example, studied the ideological, epistemological, and pedagogical views of traditionalists and developmentalists in the Icelandic Social Science Curriculum Project. Jóhannesson (1991, 1993) studied the conflict in epistemology and the actor-position in the reforms of curriculum in Iceland, focusing on how certain senses of nation and individuality were displaced in the new curriculum reforms.

This notion of the state as a set of governing practices has been prominent in postmodern discussions about the politics of knowledge. The concern is to understand how power is deployed through multiple capillaries that produce and constitute the "self" as an agent of change (Young, 1990; Shapiro, 1992; Bulter, 1993; Barrett & Phillips, 1992). It considers the ways in which the discourses of government, social science, and professionals criss-cross in the production of disciplining strategies in administering the inner capabilities the individual who acts as a self-responsible and self-motivated citizen, what I will later call the governing of the soul (see, Rose, 1987). This link between knowledge and the governing of the self is significant within the educational arena as school pedagogy is a practice that administers (develops and nurtures) the child's soul.

In this sense of the state, the literature questions the use of the binary of state and civil society found in policy discussions of changes in the welfare state and neoliberalism. Governance is understood as the practices that regulate the conduct of conduct that circulates among different institutions that transverse the formal apparatus of the state and the institutions of civil society (Barry et al., 1996; Popkewitz, 1996; Schram & Neissor, 1997). Sigley (1996), for example, argues that most Anglo-American literature has viewed the changes in the state through certain ideological lenses of liberalism that see a distinction between the private and the public. By focusing on Chinese policy on birth control, Sigley explores the difficulties of such distinctions that underlie state/civil society categories. He argues that the Chinese state is loosening screws in one area (liberalization)

and tightening them in another. If we focus on the policy discourses with the problematic of governing the conduct of conduct (Sigley, p. 459), we find a need to explain the anomaly of increased liberalization in most areas and then increased penetration of the state into the family in another. If we use China as example, it is not a liberal political theory orientation of state reasons in terms of moralistic and cosmological order of an arts of living. Rather, it is a hybrid of a classic Confucian maxim on achieving social harmony that mixes with Maoism and capitalism to produce a relation between the cultivation of the self that flows into the good management of the family in terms that allow for effective government of the state and ensure peace under heaven for the individual (p. 464).

Our *argument to this point is that if we view the state as only confined to governmental agencies in the current historical conjuncture, we misrecognize the power relation through which the governing practices are formed.* While similar "reform" practices about decentralization and autonomy circulate among many of the countries in this study, there are historical distinctions in the constituting of relations and power in the educational arena. These governing practices cross civil society and the formal governmental agencies that are typically associated with the state. Rather than an entity that exercises power, the state is understood as a series of relations through which governance is constructed and inclusion/exclusion produced through the rules of reason and the reasonable person.

V. SOME CONCLUDING REMARKS: RELATIONAL CONCEPTS OF ACTORS AND KNOWLEDGE

This review has focused on different theoretical ways in which the concepts of governance and inclusion/exclusion have been discussed in the literature. Our first task in this review has been to consider the conceptual difficulties involved in that task. We discussed the multiple literatures and the different subcategories that are involved in conceptualizing each of the concepts. We also explored some of the possible dangers and limitations of using such categories as social exclusion, such as eluding previously highlighted categories of class and social stratification. We also discussed how different national traditions highlighted different ideological foci such the French concern with social inclusion as related to collective obligations of the state to society in steering society versus Anglo-Saxon liberal traditions which put a premium on promoting opportunities for individual success and inclusion. The problem of this review was also bound to the fact that the conceptual relation of governance and inclusion/exclusion was not explicitly explored in previous literature except tacitly in, for instance, a discussion of the relation of governmental policies of labor markets and employment or educational access.

Our discussion sought to explore two different research traditions for understanding the relation of governance and inclusion/exclusion. These links are not explicit within the literature except with some general assumption that state policies and administrative practice influence who are included and excluded. We explored how governance studies and studies of inclusion and exclusion are related to each other and inscribe mutually related principles even when these principles are not explicitly considered.

For our purposes, we thought of inclusion and exclusion as a single concept, mutually related. Further, we sought to consider two different types of relations between the concept of governance and inclusion/exclusion, that of the problematic of equity and of knowledge. We assume that as our work moves further into the case studies and their comparative implications, this conceptual relations of the two problematics will be revised and revisioned.

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For analytical purposes, we focused first on the relation of governance and inclusion/exclusion as a problematic of equity. This dominant problematic has many variations and different ideological agendas but can be summarized as defining the issue of governance through examining the policies and practices through which individuals and groups are given access and opportunity to participate in social, economic, and cultural activities. Class concepts and access to labor markets are the most prominent in this approach, although concepts related to ethnicity, race, and gender have assumed greater prevalence in recent years. The specific mix and emphasis depended on the national context.

In the equity approach, we argued that the problem is generally to find the most effective ways to promote inclusion. Inclusion is often treated as an absolute term in which there is belief that, at least hypothetically, there exists a final point that is totally inclusive. Thus the concept of exclusion stands only for a different point that will eventually be eliminated through wise policy and governance practices. Gender research, within this problematic, should identify practices and strategies of inclusion of girls into school programs that have typically not had adequate representation, such as in the science and mathematics school subjects. It is assumed in policy and research, at least tacitly, that a point of inclusion can be found in which there is no exclusion related to gender.

When the equity approach is viewed at a macro level, it assumes governance and inclusion/exclusion tied to structural concepts. One prominent structural category is the state as an actor whose legislation, admission policies, and steering efforts govern through fiscal policy, legislation, and bureaucratic practices. Thus, the state stands as an entity whose legal/ administrative practices influence, if not determine, who was to be included and excluded. At a system level, conceptualization of neoliberalism and marketization of education provides one example of current policy research concerned with a problematic of equity, even when the literature is critical of the basic assumptions of the policy orientation. Discussions of decentralization are another category of governance that is linked to practices of inclusion and exclusion.

Our second conceptual discussion related to governance and inclusion/exclusion as related to a problematic of knowledge. This problematic focuses on the ways in which the rules and standards of

reason organize principles that function to qualify and disqualify individuals as the level of being, that is, the dispositions, sensitivities, and awarenesses that govern participation and action. In exploring this problematic, we used the metaphor of map-making to consider how the rules for ordering and classifying objects produce distinctions and differentiations that divide and normalize the individuality of people. This ordering and classification, we argued, functions to govern individuals differentially in making participation possible. These systems of reason are not individual or personal in nature but are socially constructed and are the effects of power that produce different principles

It is at the level of governing action and participation that this problematic focuses on the relation of governing to inclusion and exclusion. We discussed, for example, the move from structural and social issues of inclusion and exclusion to those of cultural projects related to constructions of identity. From this analytical view, the problematic explored a different way of considering current clashes surrounding identity, minority rights, and gender from that of the equity problematic. Among the conceptual apparatuses in studying the relation of governance and inclusion/exclusion were concerns with the fabrication of identities, the construction of memory and forgetting as it relates to nation-ness, and the troubles involved in categories of gender, ethnicity, and class when considering categories as hybrids and discursive formed as effects of power. The literature examined governing and governance as a relational concept, posing the idea of the state as the mobilization of discursive practices through which power circulates and subjectivities were produced. This notion of the state as a relation concept related to knowledge crosses over institutional analyses when considering, for example, the idea of childhood and gender in education.

In exploring these different problematics, this research project recognizes a need to join the equity and knowledge problematics. This joining of the two problematics, however, is not merely an additive problem of doing a little of one (equity) and a little of the other (discursive analyses). It is, we believe, rethinking the conceptual ways in which we have organized research on governance

and inclusion/exclusion. We can think of our concern in this research as understanding the relations of the groups of actors influential in educational decision-making and the discursive rules about inclusion/exclusion deployed to construct the subjects and subjectivities that differentiate the different groups. This is not an equity problem nor it is solely one of knowledge, per se, but a relational question of fields of interaction.

APPENDIX 1: A search of the ERIC database for the EGSIE project.

Introduction

This appendix describes how the Educational Resources Information Center (ERIC) was used to get a picture of education governance and social integration and exclusion in educational research. ERIC was established in 1966 and is presently funded by the Office of Educational Research and Improvement (OERI) of the U.S. Department of Education. ERIC has a database consisting more than 700,000 documents and journal articles that deal with education (*Thesaurus of ERIC Descriptors 12th ed.*, 1990). The data in the ERIC database can be reached either by computer search or by published indexes from ERIC.

Work procedure

A first step is to identify one's topics of interest. "Governance," "social integration," and "exclusion" are the keywords in the EGSIE project and can thus be used as a starting platform. Other terms, such as dropouts, can also be used.

The Thesaurus of ERIC Descriptors

To make a relevant search in ERIC, the *Thesaurus of ERIC Descriptors* (1990) is one way to proceed. The thesaurus is divided into four parts, of which the main part is "Alphabetical Display," and then there are the "Rotated Display," the "Hierarchical Display" and the "Descriptor Group Display." With the help of the thesaurus, it is possible to "translate" topics that are of interest into ERIC descriptors, subject index terms.

The first step in making a search within ERIC is to put the topics of interest into "ERIC-language" in the Rotated Descriptor Display in the thesaurus. Governance, educational policy and social integration are listed as ERIC descriptors in the Rotated Descriptor Display but neither "exclusion" nor "social exclusion" can not be found at all.

The initial terms – governance, educational policy, social integration, and dropouts, with the exception of social exclusion/exclusion, were, according to the thesaurus, descriptors that

could be used to make a search in ERIC. But there can also be Broader Terms (BT), Narrower Terms (NT) and Related Terms (RT). These terms are listed in the Alphabetical Descriptor Display in the Thesaurus. By looking up the descriptors shown in the Rotated Descriptor Display, it is possible to obtain more descriptors. Scope Note (SN) then describes how ERIC uses the terms.

Table 1. Example of a descriptor, "Academic Libraries," from the Alphabetical Descriptor Display *(Thesaurus of ERIC Descriptors* 1990)

ACADEMIC LIBRARIES
SN Libraries forming part of, or associated with, institutions of higher education.
NT College Libraries
BT Libraries
RT Archives
Depository Libraries
Learning Resources Centers
Research Libraries
Special Libraries

Of interest are descriptors that are of a broader type (not to be confused with BT, Broader Terms) to minimize the amount of searches. By working in steps in the Alphabetical Descriptor Display, looking up descriptors, sorting out related descriptors, looking up the related descriptors, sorting out related descriptors again, finally (hopefully) the descriptors refer to each other.

Results from the Thesaurus reading

After several re-readings in the Alphabetical Descriptor Display, a few more descriptors were found. In addition to the initial ones, they were *Politics of Education, Social Discrimination* and *Educational Discrimination.*

Governance

- The policy-making, objective-setting, and exercise of authority in an organization, institution, or agency – includes administrative or management functions to the extent that they relate to the execution of policy and authority. (*Thesaurus of ERIC Descriptors,* 1990, p 109)

Governance was one of the initial terms (The list given in the Alphabetical Descriptor Display is presented in Appendix 2, Table 1). The Related Terms (RT) for this descriptor were not of interest for this search.

Educational Policy

Two Related Terms (RT) to Educational Policy (Appendix 2, Table 2) seem to be useful. These are *Politics of Education* (Appendix 2, Table 3), "political aspects of governance and decision making within educational systems and institutions, and political activities related to education in general." (*Thesaurus of ERIC Descriptors,* 1990 p. 196) and *School Restructuring* (Appendix 2, Table 4), "A 'second wave' reform strategy of the U. S. 'excellence in education' movement, based on the premise that the organization of schools must be changed in order to stern widespread academic failure and to meet higher standards demanded by society – bureaucratic decentralizations is the core component, whether in the form of school based management, a choice plan, or some variation on privatization" (*Thesaurus of ERIC Descriptors,* 1990 p. 229).

Social exclusion

Neither exclusion nor social exclusion were listed in the Thesaurus. But it was possible to use the term as a descriptor in the database search, since social exclusion is used by authors so the word is included in the database record and is therefore searchable.

Social integration

> Process of uniting the diverse groups of society into a cohesive and harmonious whole. (*Thesaurus of ERIC Descriptors,* 1990 p. 242)

When social exclusion/exclusion couldn't be found, one of the related terms to social integration (Appendix 2, Table 5) could be a substitute, social discrimination. The definition of *Social Discrimination* (Appendix 2, Table 6) in ERIC is "unfavorable treatment of individuals or groups on arbitrary grounds (note: do not confuse with various "bias" terms, which refer to prejudicial attitudes that may lead to such treatment)". From social discrimination, another

related term was found, *Educational Discrimination* (Appendix 2, Table 7), a more narrow term relating only to education.

Dropouts

> Individuals who withdraw from an activity (e.g. educational program) before its completion. (*Thesaurus of ERIC Descriptors*, 1990 p. 74)

The terms related to dropouts (Appendix 2, Table 8) in the Alphabetical Descriptor Display were not of a kind that was interesting for this search.

The ERIC Database search

It is possible to make both a manual search (by using various printed annual and monthly indexes from ERIC) and a computer search within ERIC. The computer search, however, is not as time-consuming as the manual search and it is also more refined, since every word in the database record is stored and accessible from the year 1966 till the present.

The computer search can originate from e.g. descriptors, authors, institutions, specific journals, unique words or phrases.

Database search results

This specific search is based on ERIC Descriptors. By combining the different descriptors, it is possible to find texts relevant to the EGSIE project in the ERIC database within a manageable amount. The descriptors alone give far too many matches (See below).

The texts that are found are presented after free choice. In the ERIC Thesaurus (p xiii), the different variables are presented; these variables are also searchable fields. Of main interest is the title, author, year of publication and where it was presented or published, and an abstract of the text (See Appendix 3).

The combinations that were used, the number of matches, and how many of them that were of interest are presented below (e.g., Social exclusion 4(18) - 4 interesting matches out of 18):

- Social Exclusion 4(18)
- Social Integration 2,385
- Social Integration and Exclusion 3(11)
- Governance 7,456
- Governance and Exclusion 3(14)
- Governance and Social Integration 0(4)
- Governance and Educational Discrimination 2(8)
- Governance and Dropouts 5(17)
- Politics of Education 3,921
- Politics of Education and Exclusion 4(17)
- Politics of Education and Social Integration 6(18)
- Politics of Education and Educational Discrimination 47
- Politics of Education and Dropouts 12(15)
- Educational Policy 3,591
- Educational Policy and Exclusion 63
- Educational Policy and Social Integration 2(12)
- Educational Policy and Educational Discrimination 101
- Educational Policy and Dropouts 199
- Educational Discrimination 988
- Dropouts 6,168

Searches that gave more than 40 matches were considered to be too inclusive to handle and were therefore sorted out.

Sorting out interesting texts

The only texts of interest were those that dealt with governance/education policy and its relation to social integration/exclusion among children and youth in education. This included international texts as well as national and local, theoretical as well as empirical. The abstracts that were presented by the search were read through several times to sort out texts that dealt with the issue that was of interest. The texts that were found can be divided into a taxonomy with five sections:

1 a) National/Local b) National c) International/European d) International/World	**2** a) Ethnicity b) Disabilities c) Gender d) Social Class
3 a) All Education b) Higher Education c) Compulsory Education d) Pre-school	**4** a) Segregation b) Desegregation c) Integration d) Social Exclusion
5 a) Description of Education Situation then and now b) Description of Education Situation now c) The role of Education in the future, policy related.	

One example: Bruce Kappel and others' text *1990 Report: "The Heart of Community is Inclusion"* is national and local, 1 a), it focuses on people with disabilities, 2 b), in all education, 3 a), and their need of inclusion, 4 c), in today's Minnesota, 5 b). The texts that were found and sorted out as relevant are presented in Appendix 3.

The texts that were found

Only 41 texts remain out of a total of 134. The texts originate mainly from the United States and deal with an American context. The texts range from seven-page papers from conferences and articles in journals to books extending over 600 pages. Eleven texts were published in international journals. One half of the texts were based on empirical materials and the other half on theoretical reasoning.

The topics that were dealt with differed to a large extent. Ten different categories could be recognized. They were:

- *Overviews of education policies over time* (4 texts)
  Policies concerning vocational education, black students, evolution of higher education, equality, integration, and decentralization.
- *Using education as a political tool* (2)
  Education as a tool for changing the society and as a part of the citizen participation in the society.

- *Inclusion of children and youth with different kinds of disabilities in education* (6)
- *Reforms and policies concerning disadvantages and risk youth* (5)
  The impact on youth at risk and disadvantages from education policies and reforms.
- *The education market and social exclusion* (3)
  How the new education market with, for instance, vouchers and school choice policies, affects social exclusion and segregation
- *Policies for multicultural education* (2)
  Public education in multicultural societies and the exclusion of immigrants/citizens at the structural, institutional, and educational level. The educational policy and its relation to political power when it comes to multicultural education.
- *Reforms in education and the effects on integration, desegregation, and communications between the leaders and the masses* (4)
- *Policy text to prevent failure at school* (1)
  A resolution from the Ministers of Education of the European Community.
- *Transformations and changes needed in education and governance to improve the existing education system or the society* (7)
- *Social exclusion as a consequence of education failure (like drop-outs from school) and unemployment* (5)
- *A focus on gender, especially women, and the situation in education.* (1)

Two contradictory positions in policy debates and research discourses considering new ways of governing education are of interest for the work of the EGSIE project:

- New ways to govern education are necessary in order to obtain a fairer, more sensitive, and more efficient educational system, which is necessary in order to achieve a more developed society that will be able to fight injustice.
- New ways to govern education will lead to increased segregation and decreased equity and equality in education as well as in society and will increase the amount of social exclusion. (Governance and Social Integration and Exclusion in Europe:

Proposal for the Programme on Targeted Socio-Economic Research (TSER), 1997)

How do the texts found in ERIC relate to these two positions? It turned out that all of the texts dealt with questions related to the two positions. Most of the texts rejected the way that education is governed now and felt that earlier reforms have been unsuccessful in terms of social inclusion and exclusion. But the authors suggest new reforms and new ways of governance as a solution to the existing problems.

References

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Governance and Social Integration and Exclusion in Europe: Proposal for the programme on Targeted Socio-Economic Research (TSER). 1997

APPENDIX 2: Lists from ERIC Alphabetical Descriptor Display

Table 1. Governance
NT Administration
Community Control
Federal Regulation
RT Administrative Organization
College Governing Councils
Governing Boards
Government (Administrative Body)
Government School Relationship
Institutional Autonomy
Policy Formation
Politics
Professional Autonomy
School District Autonomy
Tribal Sovereignty
Trustees

Table 2. Educational Policy
BT Policy
RT Bilingual Education
Board of Education Policy
Education
Educational Administration
Educational Assessment
Educational Principles
Excellence In Education
Language of Instruction
Language Planning
New Federalism
Official Languag:
Politics of Education
Regular and Special Education Relationship
School District Autonomy
School Policy
School Restructuring
Self-determination

Table 3. Politics of Education
UF Educational Politics
BT Politics
RT Board Administrator Relationship
Board of Education Policy
Education
Educational Administration
Educational Finance
Educational Legislation
Educational Policy
Family School Relationship
Government School Relationship
Parent School Relationship
Political Issues
School Community Relationship
School Law
School Policy
School Role
Teacher Administrator Relationship

Table 4. School Restructuring
UF Restructuring of Schools (United States)
BT Excellence In Education
School Organization
RT Decentralization
Educational Change
Educational Innovation
Educational Philosophy
Educational Policy
Organizational Change
Organizational Development
Participatory Decision Making
Professional Autonomy
School Based Management
School Choice
School District Autonomy
School Effectiveness
Transitional Schools

Table 5. Social Integration
UF Ethnic Integration
Integration (Social)
Social Class Integration
NT Classroom Desegregation
Neighborhood Integration
Personnel Integration
Racial Integration
School Desegregation
Voluntary Desegregation
RT Acculturation
Cooperative Learning
Cross Cultural Training
Cultural Interrelationships
Desegregation Effects
Desegregation Methods
Desegregation Plans
Ethnic Groups
Ethnic Relations
Human Relations
Integration Readiness
Interaction Process Analysis
Interfaith Relations
Interpersonal Relationship
Multicultural Education
Social Change
Social Class
Social Differences
Social Discrimination
Social Environment
Social Influences
Social Networks
Social Problems
Social Systems
Tokenism

Table 6. Social Discrimination
UF Bigotry
Discrimination
NT Age Discrimination
Educational Discrimination
Ethnic Discrimination
Handicap Discrimination
Housing Discrimination
Racial Discrimination
Religious Discrimination
Reverse Discrimination
Sex Discrimination
RT Caste
Civil Rights
Civil Rights Legislation
Discriminatory Legislation
Equal Facilities
Ghettos
Intergroup Relations
Minority Groups
Segregationist Organizations
Social Bias
Social Integration
Test Bias

Table 7. Educational Discrimination
NT School Segregation
BT **Social Discrimination**
RT **Access to Education**
Affirmative Action
Age Discrimination
Education
Educational Opportunities
Equal Education
Handicap Discrimination
Nondiscriminatory Education
Racial Discrimination
Reverse Discrimination
Selective Admission
Sex Discrimination

Table 8. Dropouts
UF College Dropouts
Dropout Problems
Dropout Role
Early School Leavers
High School Dropouts
Rural Dropouts
School Dropouts
Urban Dropouts
NT Adult Dropouts
BT Groups
RT Academic Failure
Academic Persistence
Attendance
Attrition (Research Studies)
Continuation Students
Dropout Attitudes
Dropout Characteristics
Dropout Prevention
Dropout Programs
Dropout Rate
Dropout Research
Enrollment
Expulsion
High School Equivalency Programs
No Shows
Out of School Youth
Persistence
Potential Dropouts
Reentry Students
Reentry Workers
Rehabilitation
Retraining
Runaways
School Holding Power

Special Needs Students
Stopouts
Student Attrition
Truancy
Withdrawal (Education)

APPENDIX 3: Short descriptions of findings by ERIC

SOCIAL EXCLUSION 4(18)
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SOCIAL EXCLUSION 4 (18)

Record 1 of 4 - ERIC 1992-12/97

AU: Cochinaux,-Philippe; de-Woot,-Philippe
TI: Moving towards a Learning Society. CRE-ERT Forum Report on European Education.
CS: European Round Table of Industrialists, Brussels (Belgium).; Association of European Universities, Geneva (Switzerland).
PY: 1995

Record 2 of 4 - ERIC 1992-12/97

TI: Measures To Combat Failure at School: A Challenge for the Construction of Europe.
CS: EURYDICE European Unit, Brussels (Belgium).
PY: 1994

Record 3 of 4 - ERIC 1992-12/97

AU: Debeauvais,-Michel
TI: Outcasts of the Year 2000: A Challenge to Education in Europe.
PY: 1992
JN: Comparative-Education; v28 n1 p61-69 1992
NT: Theme issue (special number 14) with title "Educating the New Europe."

Record 4 of 4 - ERIC 1992-12/97

AU: Alaluf,-Mateo
TI: The Unemployment Trap. Long-Term Unemployment and Low Educational Attainment in Six Countries: Belgium, France, Portugal, Spain, Sweden, United Kingdom.
CS: Council for Cultural Cooperation, Strasbourg (France).
PY: 1992
AV: Manhattan Publishing Co., 1 Croton Point Avenue, P.O. Box 650, Croton, NY 10520.

SOCIAL INTEGRATION AND EXCLUSION 3 (11)

Record 1 of 3 - ERIC 1992-12/97
AU: Belhachmi,-Zakia
TI: A Third View of the Role of the Public School in Multicultural Canada.
PY: 1996
AV: Zakia Belhachmi, 2255 Saint Mathieu, #1101, Montreal H3H 2J6 Quebec Canada.
NT: 34 p.; Paper presented at the Annual Meeting of the American Educational Research Association (New York, NY, April 8-12, 1996).

Record 2 of 3 - ERIC 1992-12/97
AU: Debeauvais,-Michel
TI: Outcasts of the Year 2000: A Challenge to Education in Europe.
PY: 1992
JN: Comparative-Education; v28 n1 p61-69 1992
NT: Theme issue (special number 14) with title "Educating the New Europe."

Record 3 of 3 - ERIC 1982-1991
AU: Kappel,-Bruce; And-Others
TI: 1990 Report: "The Heart of Community is Inclusion..."
PY: 1990
AV: Minnesota Governor's Planning Council on Developmental Disabilities, 300 Centennial Office Building, 658 Cedar St., St. Paul, MN 55155 (free).

GOVERNANCE AND EXCLUSION 3 (14)

Record 1 of 3 - ERIC 1992-12/97
AU: Schwartzman,-SimonTI: Policies for Higher Education in Latin America: The Context.
PY: 1993
JN: Higher-Education; v25 n1 p9-20 Jan 1993

Record 2 of 3 - ERIC 1982-1991
AU: Brown,-Rexford
TI: State Responsibility for At-Risk Youth.
PY: 1986
JN: Metropolitan-Education; n2 p5-12 Fall 1986
NT: Special issue on school retention and the problem of civic exclusion.

Record 3 of 3 - ERIC 1982-1991
AU: Langton,-Stuart
TI: Citizen Participation and Citizenship Education in the 21st Century.
PY: 1988
NT: 28 p.; Paper presented at the Conference on Citizenship for the 21st Century (Washington, DC, October 5-7, 1988).

GOVERNANCE AND EDUCATIONAL DISCRIMINATION 2 (8)

Record 1 of 2 - ERIC 1992-3/98
AU: Hill,-Arlette-C.
TI: Democratic Education in West Germany: The Effects of the New Minorities.
PY: 1987
JN: Comparative-Education-Review; v31 n2 p273-87 May 1987

Record 2 of 2 - ERIC 1982-1991
TI: Barriers to Excellence: Our Children at Risk.
CS: National Coalition of Advocates for Students, Boston, MA.
PY: 1985

GOVERNANCE AND DROPOUTS 5 (17)

Record 1 of 5 - ERIC 1992-3/98
AU: Cookson,-Peter-W., Jr., Ed.; Schneider,-Barbara, Ed.
TI: Transforming Schools.
PY: 1995

AV: Garland Publishing, Inc., 717 5th Avenue, Suite 2500, New York, NY 10022

Record 2 of 5 - ERIC 1982-1991
AU: French,-Dan; Nellhaus,-Jeff
TI: Changing Schools and Communities: A Systemic Approach to Dropout Prevention.
CS: Massachusetts State Dept. of Education, Boston.
PY: 1989

Record 3 of 5 - ERIC 1982-1991
AU: Levin,-Henry-M.
TI: New Schools for the Disadvantaged.
CS: Mid-Continent Regional Educational Lab., Aurora, CO.
PY: 1987

Record 4 of 5 - ERIC 1982-1991
AU: Fitzgerald,-Brian; Harmon,-Lisa
TI: Consumer Rights and Accountability in Postsecondary Vocational-Technical Education: An Exploratory Study.
CS: Pelavin Associates, Inc., Washington, DC.
PY: 1988

Record 5 of 5 - ERIC 1982-1991
AU: Levin,-Henry-M., Ed.
TI: Running the Local Gauntlet: Fresh Insights to District Problems. [and] Reclaiming Urban Schools: A Modest Proposal. IFG Policy Perspectives, Winter 1983.
CS: Stanford Univ., Calif. Inst. for Research on Educational Finance and Governance.
PY: 1983
JN: IFG-Policy-Notes; v4 n1 Win 1983
AV: Publications, Institute for Research on Educational Finance and Governance, School of Education, CERAS Building, Stanford University, Stanford, CA 94305-1691.

POLITICS OF EDUCATION AND EXCLUSION 4 (17)

Record 1 of 4 - ERIC 1992-12/97
AU: Doyle,-Denis-P.TI: Vouchers for Religious Schools.
PY: 1997
JN: Public-Interest; n127 p88-95 Spr 1997

Record 2 of 4 - ERIC 1992-12/97
AU: Hayden,-Carol
TI: Children Excluded from Primary School: An Effect of Quasi-Markets in Education?
PY: 1995
NT: 16 p.; Paper presented at the Youth 2000 International Conference (Teesside, England, United Kingdom, July 19-23, 1995).

Record 3 of 4 - ERIC 1992-12/97
AU: Deever,-Bryan
TI: Desegregation in a Southern School System, 1968-1974: Power/Resistance and the Discourse of Exclusion.
PY: 1992
JN: Journal-of-Education; v174 n3 p66-88 1992

Record 4 of 4 - ERIC 1982-1991
AU: Brown,-Rexford
TI: State Responsibility for At-Risk Youth.
PY: 1986
JN: Metropolitan-Education; n2 p5-12 Fall 1986
NT: Special issue on school retention and the problem of civic exclusion.

POLITICS OF EDUCATION AND SOCIAL INTEGRATION 6(18)

Record 1 of 6 - ERIC 1992-12/97
AU: Walford,-Geoffrey
TI: Diversity and Choice in School Education: An Alternative View.

PY: 1996
JN: Oxford-Review-of-Education; v22 n2 p143-54 Jun 1996

Record 2 of 6 - ERIC 1992-12/97
AU: Singh,-Garbutcheon
TI: Inverting the Social Education Curriculum.
PY: 1995
JN: International-Journal-of-Social-Education; v10 n1 p109-24 Spr 1995

Record 3 of 6 - ERIC 1992-12/97
AU: Washburn,-David-E.
TI: Multicultural Education Policy in the United States: A Social Foundations Analysis.
PY: 1995

Record 4 of 6 - ERIC 1992-12/97
AU: Oakes,-Jeannie; And-Others
TI: Creating Middle Schools: Technical, Normative, and Political Considerations.
PY: 1993
JN: Elementary-School-Journal; v93 n5 p461-80 May 1993
NT: Thematic Issue: Middle Grades Research and Reform.

Record 5 of 6 - ERIC 1982-1991
AU: Hilliard,-Asa-G.
TI: Conceptual Confusion and the Persistence of Group Oppression through Education.
PY: 1988
JN: Equity-and-Excellence; v24 n1 p36-43 Fall 1988

Record 6 of 6 - ERIC 1982-1991
AU: Lynch,-Patrick-D.
TI: The Retreat of Equality: A Commentary on International Educational Policies since 1960.
PY: 1984

NT: 22 p.; Paper presented at the Annual Meeting of the American Educational Research Association (New Orleans, LA, April 23-27, 1984).

POLITICS OF EDUCATION AND DROPOUTS 14 (15)

Record 1 of 12 - ERIC 1992-3/98

AU: Brock,-Colin; Cammish,-Nadine; Aedo-Richmond,-Ruth; Narayanan,-Aparna; Njoroge,-Rose

TI: Gender, Education and Development. A Partially Annotated and Selective Bibliography. Education Research. Serial No. 19.

CS: Department for International Development, London (England).

PY: 1997

AV: Department for International Development, Education Division, 94 Victoria Street, London SW1E 5JL, England, United Kingdom.

Record 2 of 12- ERIC 1992-3/98

AU: Wu,-Kin-Bing

TI: Mongolia: Financing Education during Economic Transition. World Bank Discussion Papers 226. East Asia & Pacific Region Series.

CS: World Bank, Washington, D. C.

PY: 1994

Record 3 of 12- ERIC 1992-3/98

AU: Pittman,-Robert-B.

TI: The Potential High School Dropout, the 21st Century, and What's Ahead for Rural Teachers.

PY: 1995

JN: Rural-Educator; v16 n3 p23-27 Spr 1995

Record 4 of 12 - ERIC 1992-3/98

AU: Kolmakova,-M.-N.

TI: What Is to Be Done with Secondary Education?

PY: 1993
JN: Russian-Education-and-Society; v35 n12 p6-19 Dec 1993

Record 5 of 12 - ERIC 1992-3/98
AU: Trombley,-William-H.
TI: Public Policy by Anecdote: The Case of Community College Fees.
CS: California Higher Education Policy Center, San Jose.
PY: 1993

Record 6 of 12 - ERIC 1992-3/
TI: Open Discussion with NACIE and Task Force Members. INAR/NACIE Joint Issues Sessions. National Indian Education Association (NIEA) Annual Conference (22nd, San Diego, California, October 16, 1990).
CS: Department of Education, Washington, DC. Indian Nations At Risk Task Force.; National Advisory Council on Indian Education, Washington, D.C.
PY: 1990
NT: 14 p.; In: The Indian Nations At Risk Task Force and the National Advisory Council on Indian Education Joint Issues Sessions Proceedings.

Record 7 of 12- ERIC 1982-1991
AU: Gandara,-Patricia
TI: Chicanos in Higher Education: The Politics of Self-Interest.
PY: 1986
JN: American-Journal-of-Education; v95 n1 p256-72 Nov 1986
NT: Special Issue on "The Education of Hispanic Americans: A Challenge for the Future."

Record 8 of 12 - ERIC 1982-1991
AU: Kantor,-Harvey
TI: Work, Education, and Vocational Reform: The Ideological Origins of Vocational Education, 1890-1920.
PY: 1986
JN: American-Journal-of-Education; v94 n4 p401-26 Aug 1986

Record 9 of 12 - ERIC 1982-1991
AU: Arnez,-Nancy-L.
TI: Black Public Policy.
PY: 1986
JN: Journal-of-Black-Studies; v16 n4 p397-408 Jun 1986

Record 10 of 12 - ERIC 1982-1991
AU: Elmore,-Richard-F.
TI: Educational Choice in Washington State: A Case of Choice. CPRE Report Series TC-003.
CS: Center for Policy Research in Education.
PY: 1990
AV: Publications, Center for Policy Research in Education, Eagleton Institute of Politics, Rutgers, The State University of New Jersey, New Brunswick, NJ

Record 11 of 12 - ERIC 1982-1991
AU: Lines,-Patricia-M.
TI: Peaceful Uses for Tuition Vouchers: Looking Back and Looking Forward.
CS: Education Commission of the States, Denver, Colo.
PY: 1985

Record 12 of 12 - ERIC 1966-1981
AU: Ostheimer,-John-M.
TI: Modernization in Tropical Africa: Changing Perspectives and Future Prescriptions
JN: Social-Science-Quarterly; 51; 1; 97-107

EDUCATION POLICY AND SOCIAL INTEGRATION 2 (12)

Record 1 of 2 - ERIC 1992-12/97
AU: Janko,-Susan; And-Others
TI: Portraits of Inclusion through the Eyes of Children, Families and Educators.
CS: Washington Univ., Seattle. Early Childhood Research Inst. on Inclusion.

PY: 1997
AV: Early Childhood Research Institute on Inclusion, University of Washington, College of Education, Box 353600, Seattle, WA 98195.

Record 2 of 2 - ERIC 1992-12/97
AU: Sailor,-Wayne; And-Others
TI: School Restructuring & Full Inclusion. Revision 5. Prepublication Copy.
CS: San Francisco State Univ., CA. California Research Inst.
PY: [1992]
NT: 94 p.

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